



iPad Buyer Survey

FY19-Q1 Report

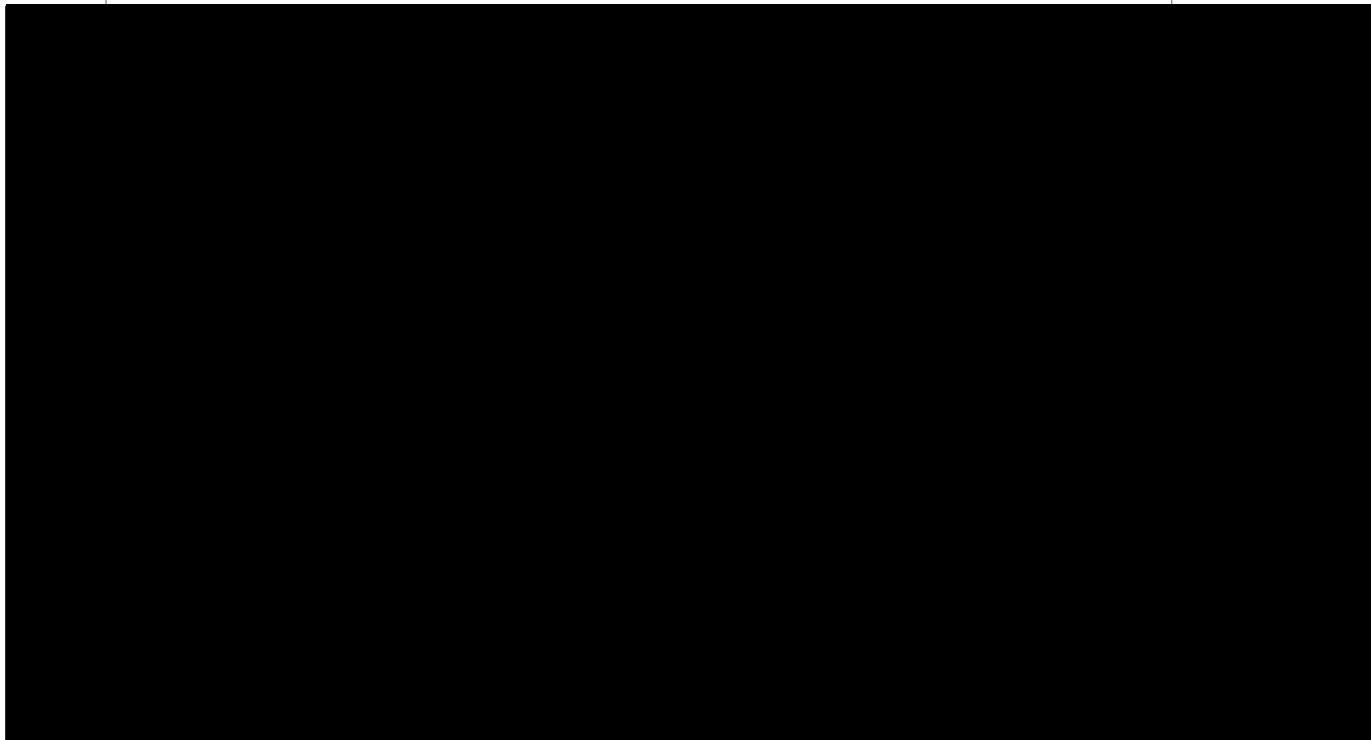
US, UK, France, Germany, China, Japan,
Mexico, India, Thailand, and Russia

Apple Market Research and Analysis



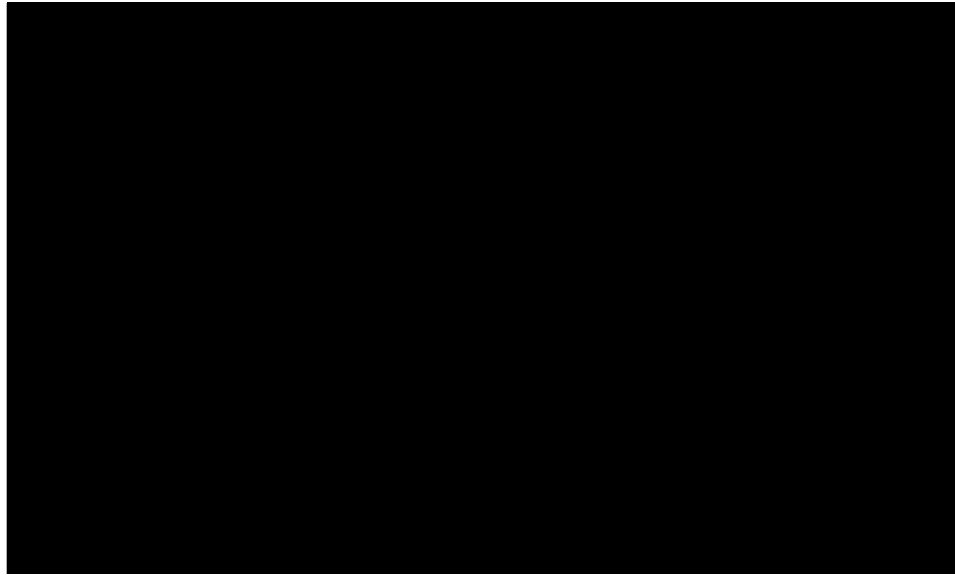
Δ DEFENDANT Δ	United States District Court Northern District of California
	Case No. 4:20-cv-05640-YGR
	Case Title <i>Epic Games, Inc. v. Apple, Inc.</i>
	Exhibit No. DX-3465
	Date Entered _____
	Susan Y. Soong, Clerk
	By: _____, Deputy Clerk

Why this report?



Methodology

iPad Buyer survey

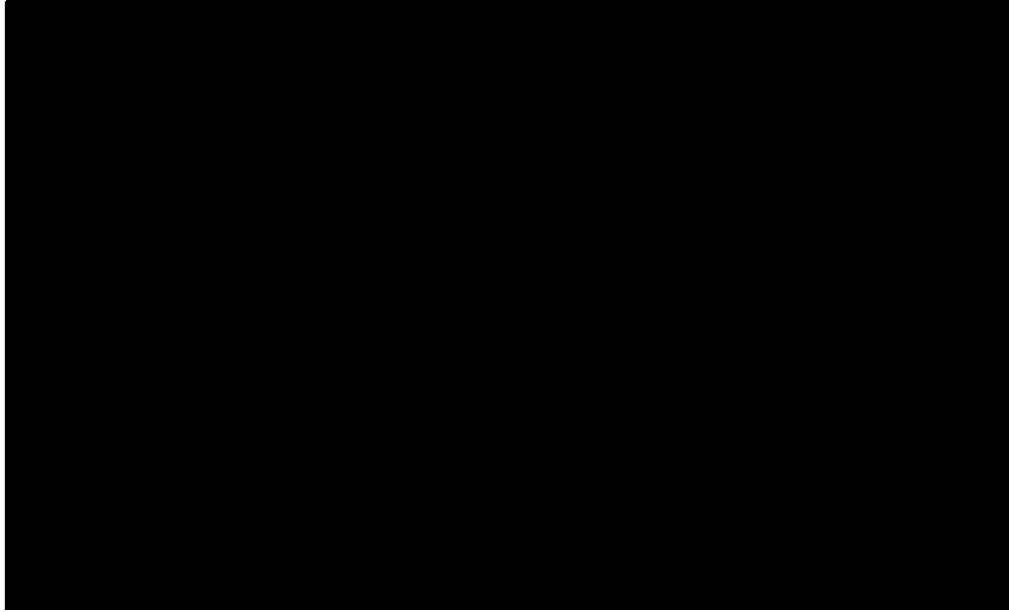


Source: FY19-Q1 iPad Buyer Survey

APPLE CONFIDENTIAL 3

Executive Summary

Acquisition method



Buy mix

First tablet, first iPad

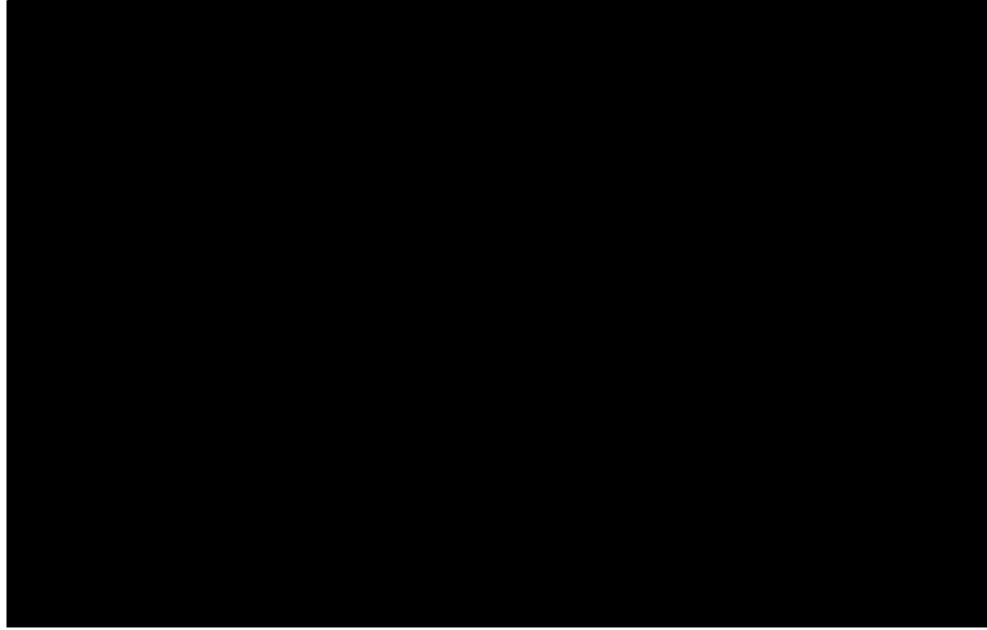


Buy mix

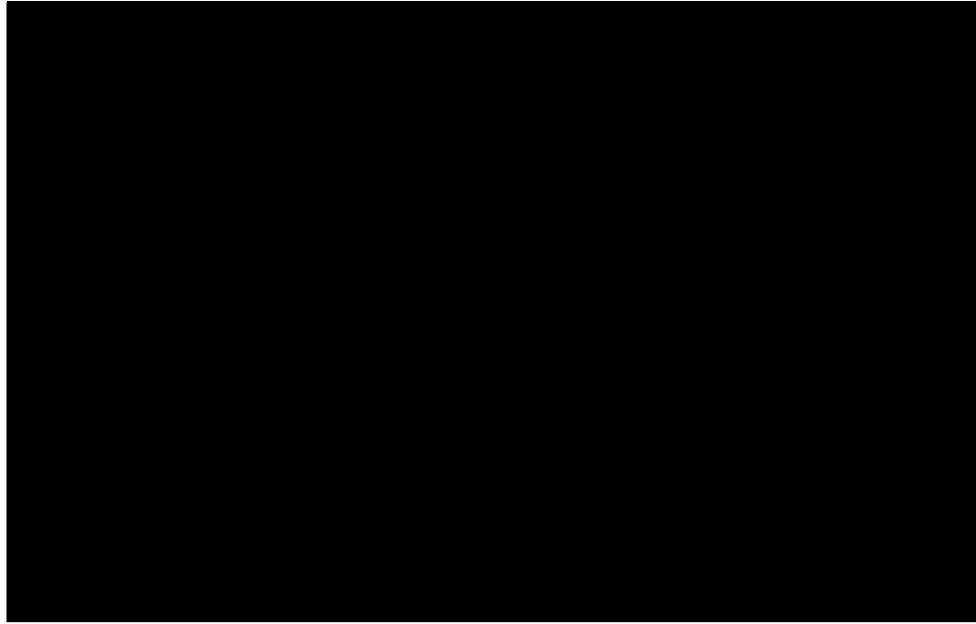
Replacing device



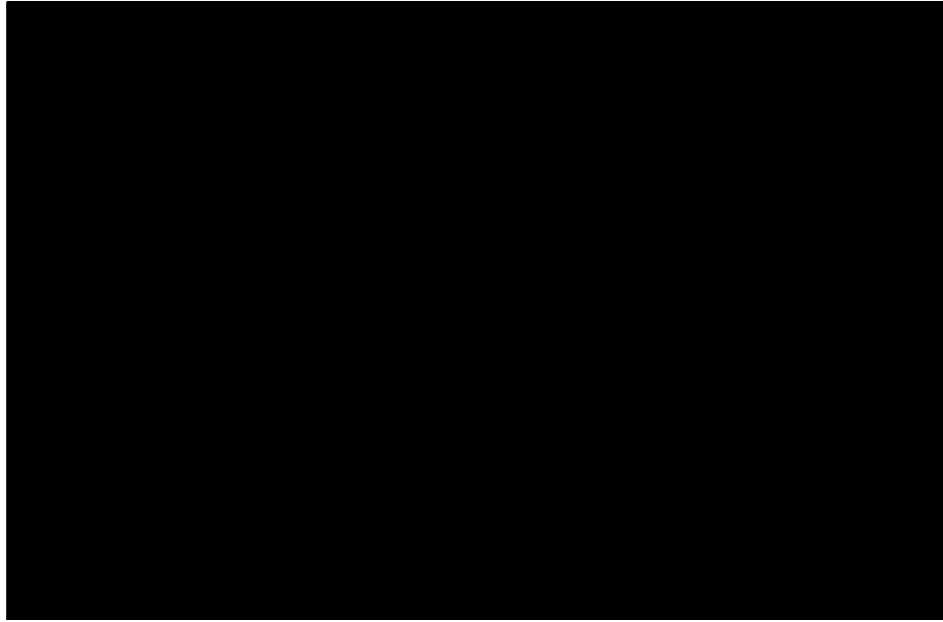
Device Replaced



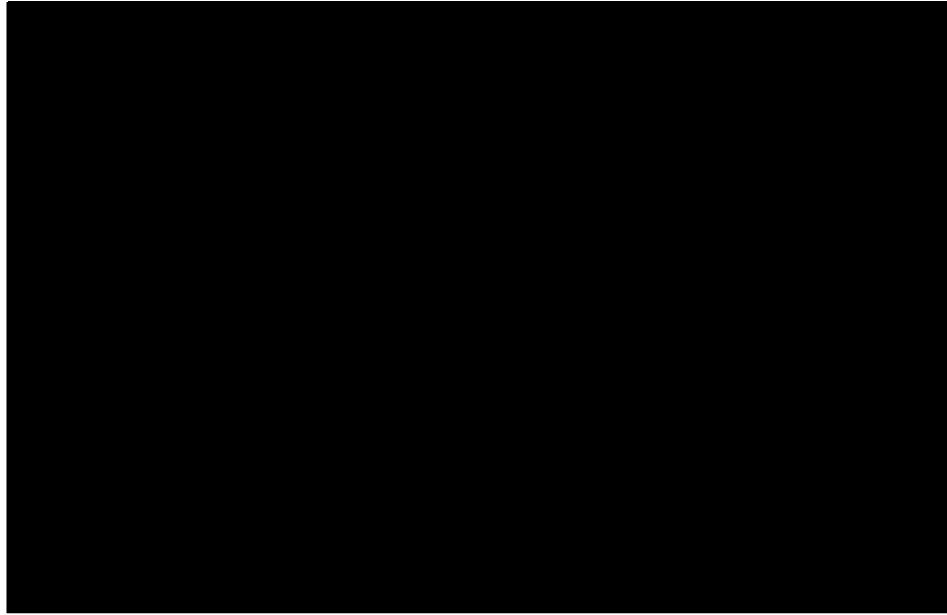
Device Replaced



Reasons for replacing the Windows laptop with the iPad

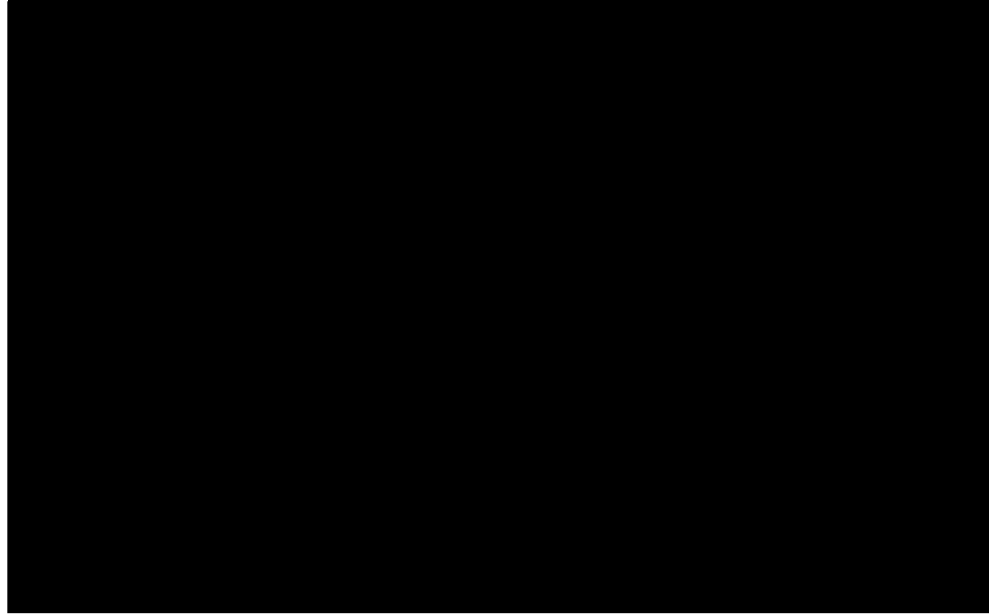


Reasons for replacing the Mac notebook with the iPad

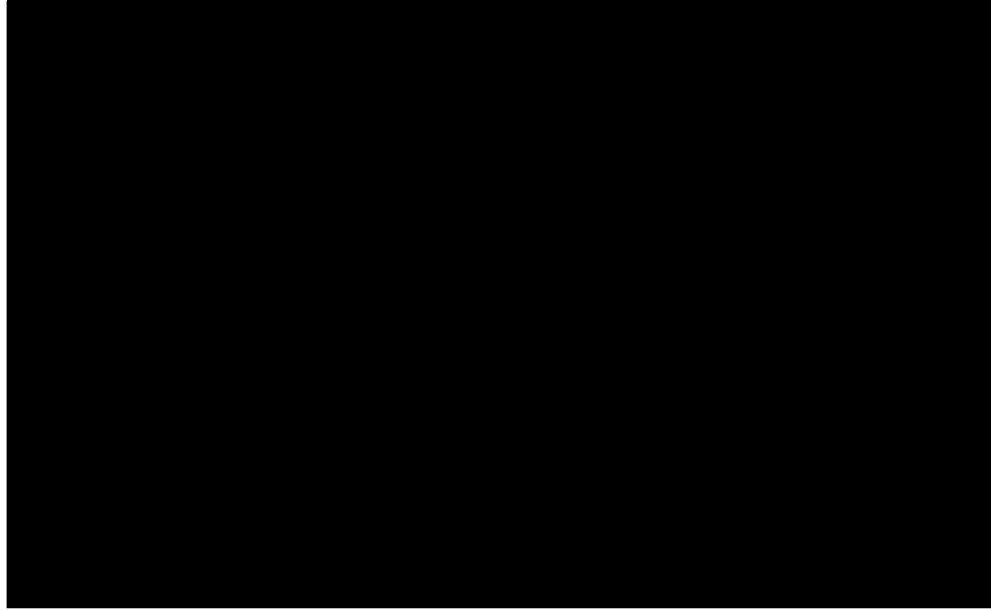


11

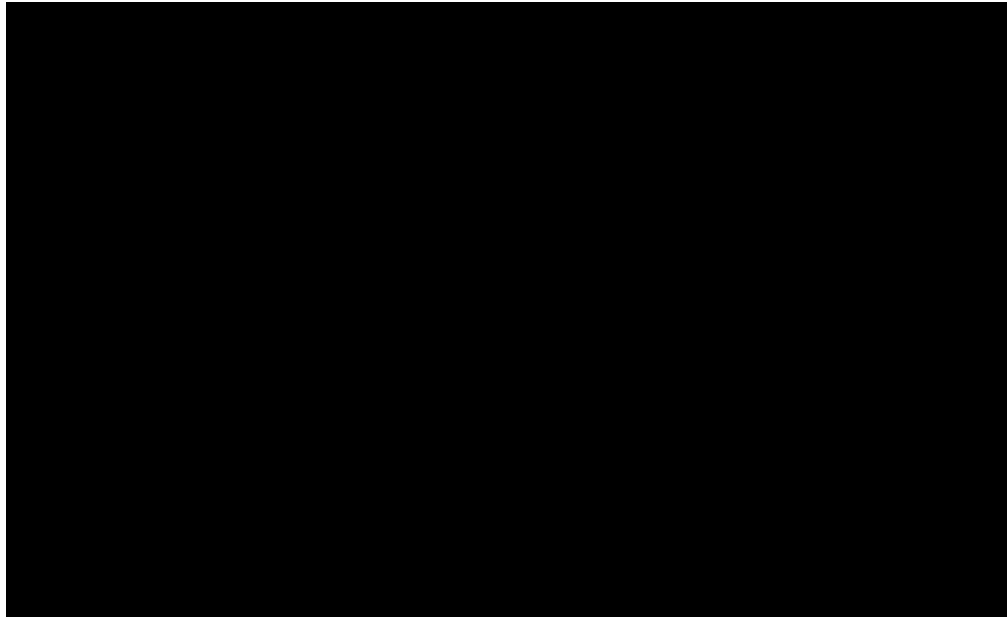
Length of ownership of replaced iPad (among those who replaced an iPad)



Length of ownership of replaced tablet (among those
who replaced a competitor tablet)

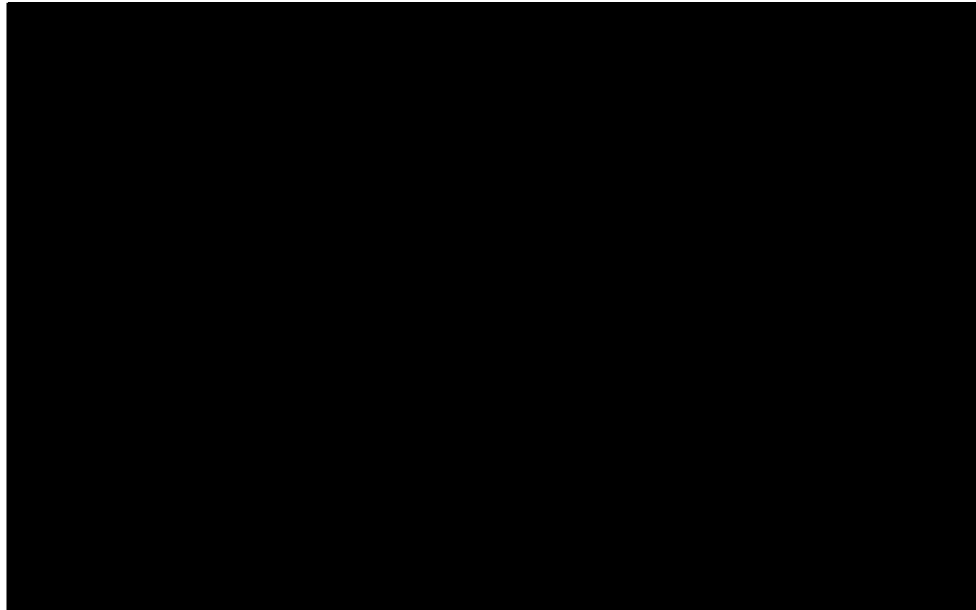


Overall satisfaction



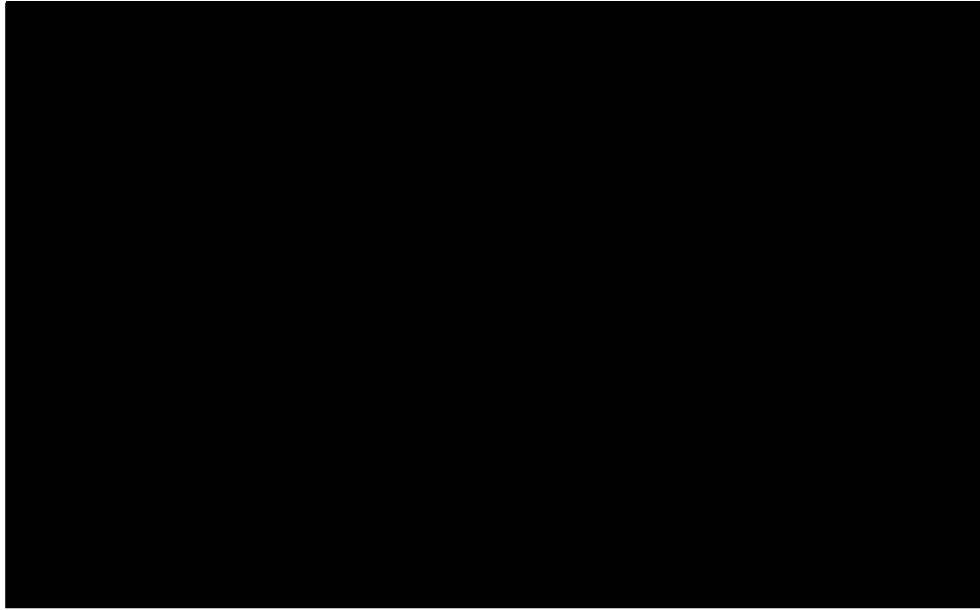
Overall satisfaction trend

Very satisfied, Somewhat satisfied



Overall satisfaction

Very satisfied, Somewhat satisfied

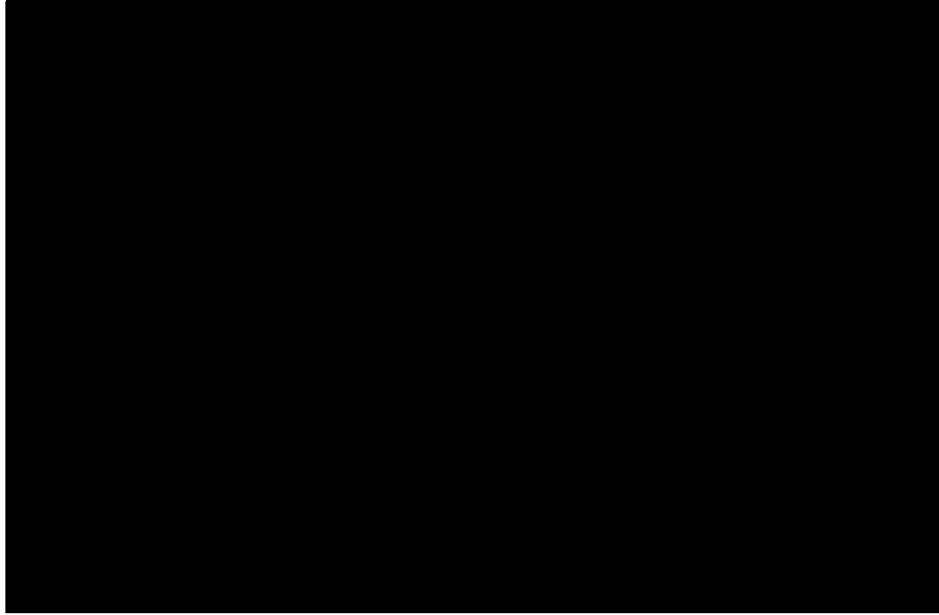


Purposes for buying the iPad

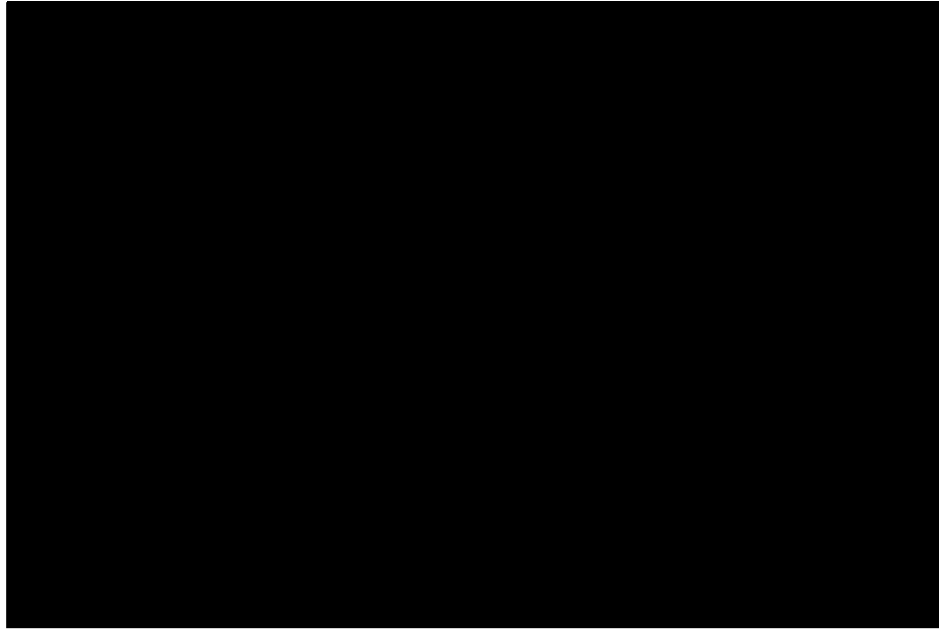
For work



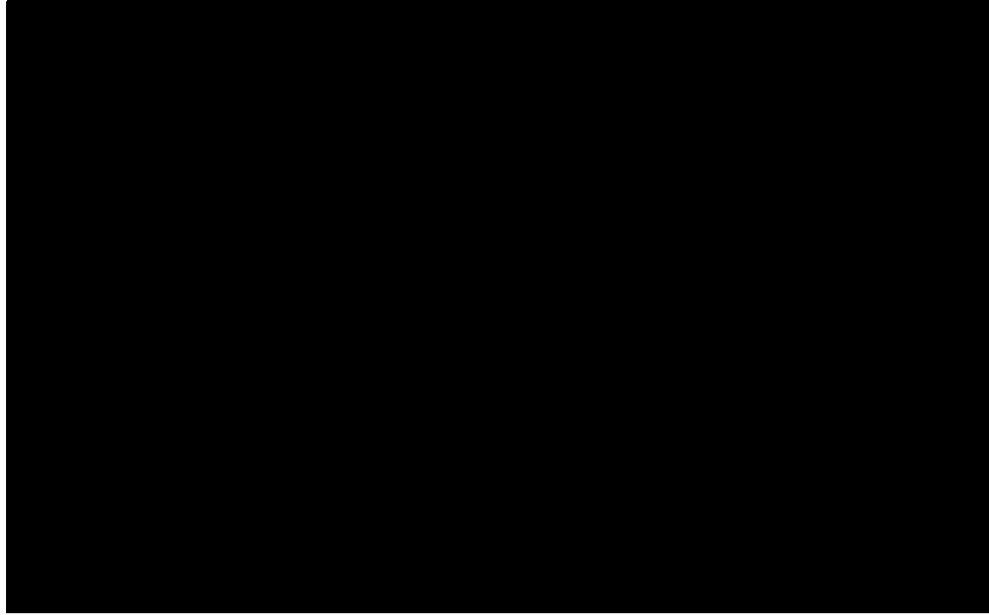
Planned activities



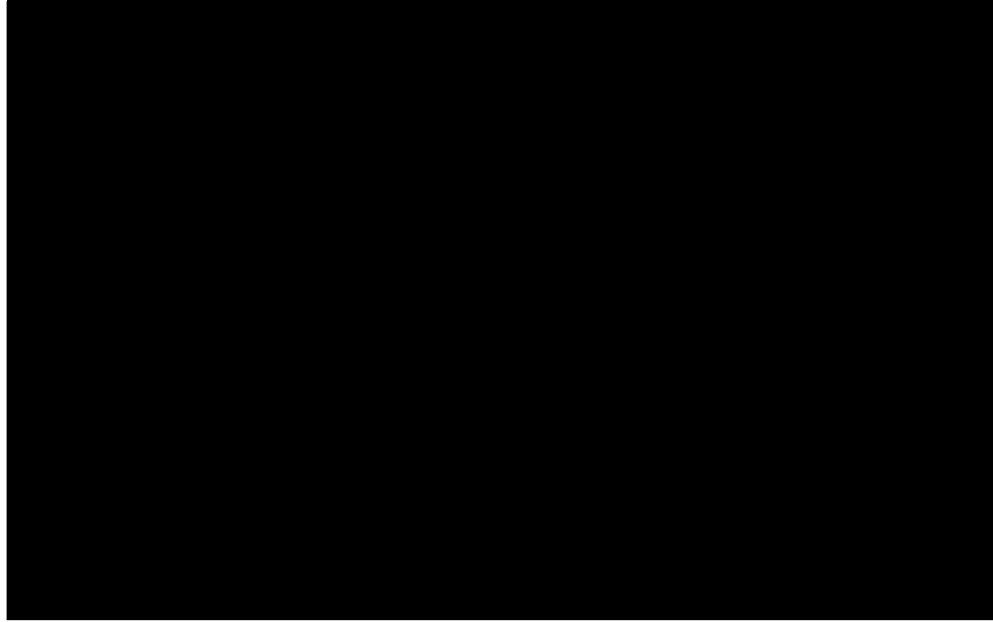
Planned activities



Considered other iPad models



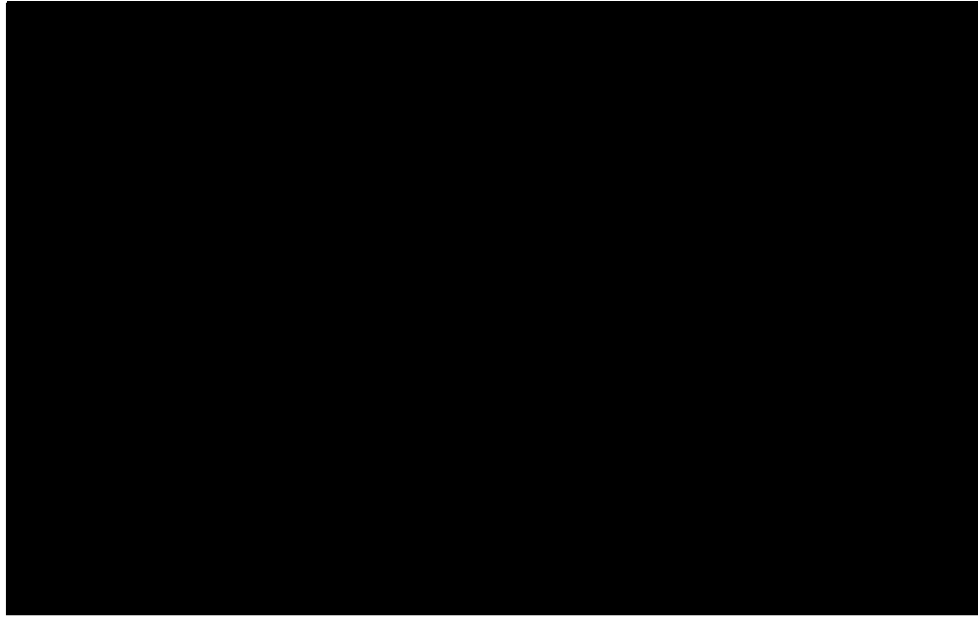
Considered other iPad models



iPad models considered (among those who considered
other iPad models)



Other devices considered (among those who considered other devices)



Important aspects in iPad purchase

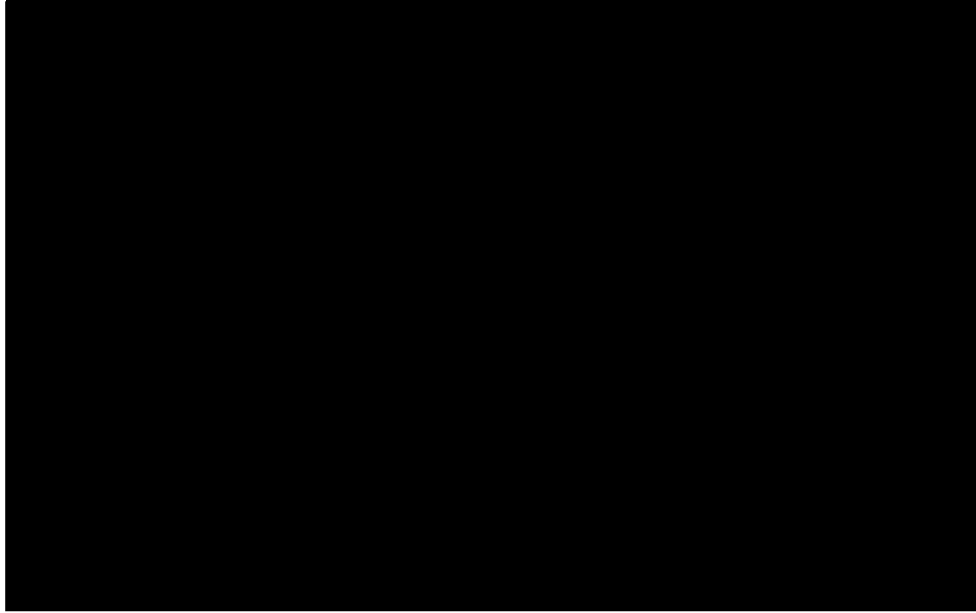
Extremely important/Very important



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Important aspects in iPad purchase

Extremely important/Very important

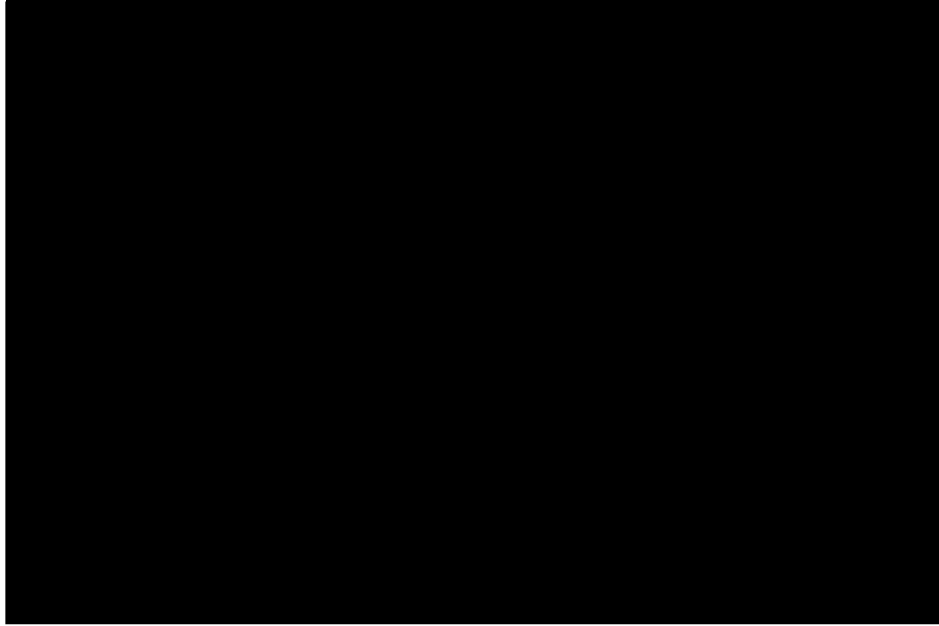


New features most influential in purchase decision

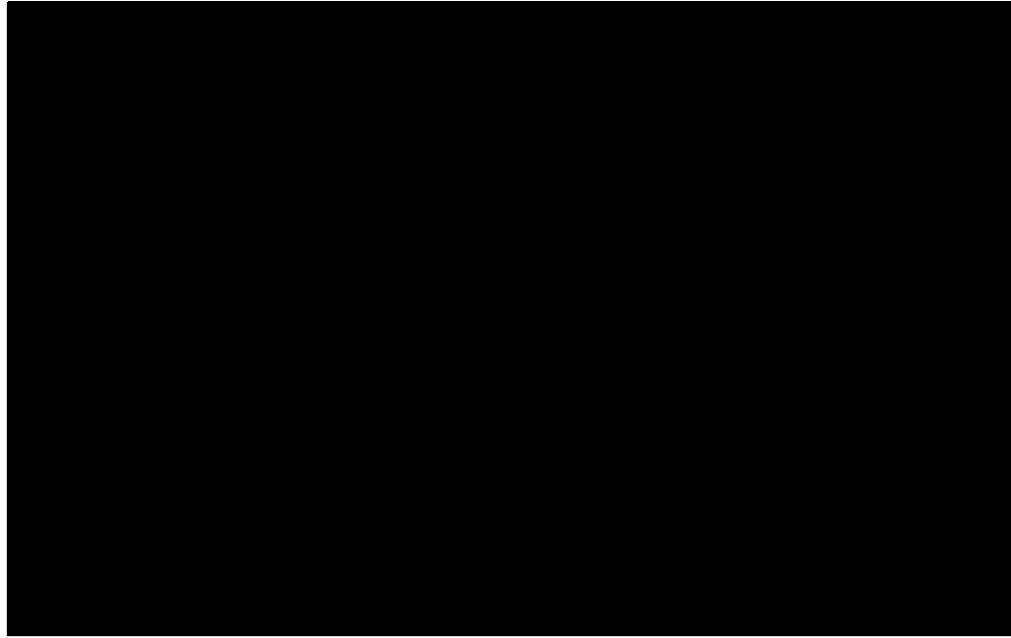


26

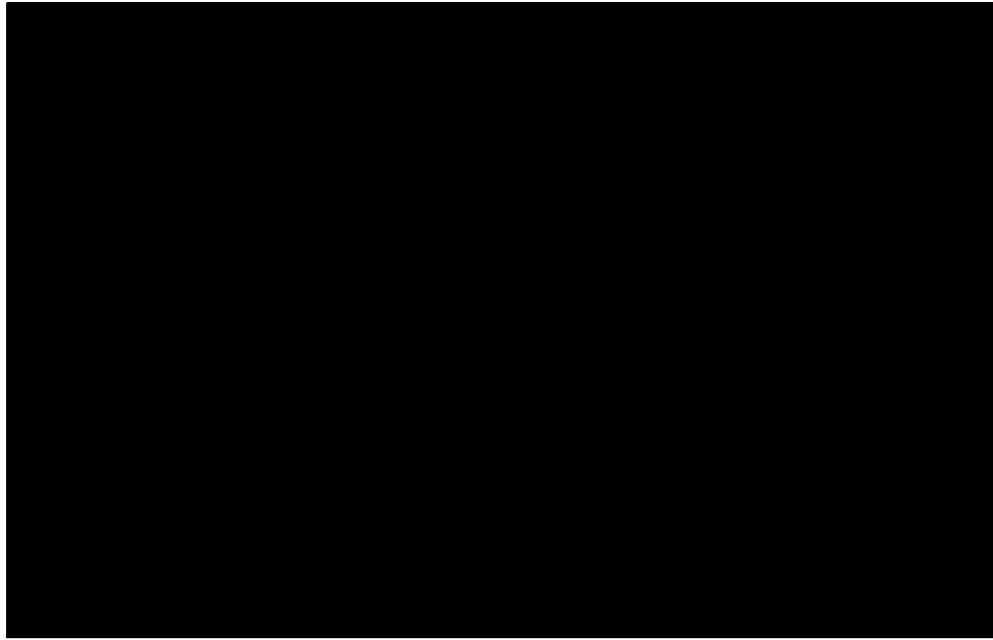
Reasons for choosing 2018 iPad Pro over the iPad (6th generation)



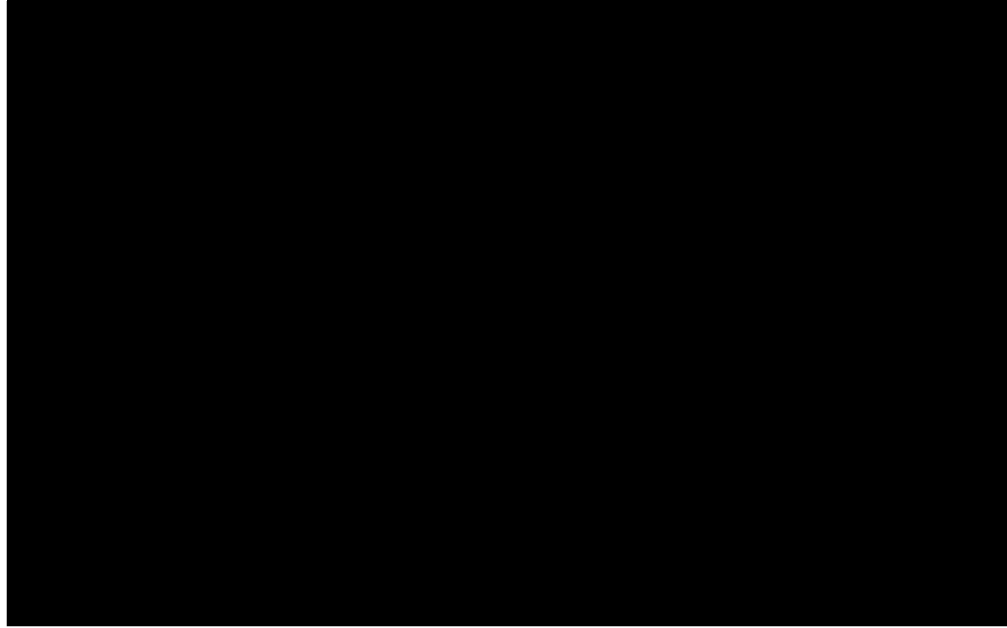
Overall Satisfaction with Face ID for unlocking



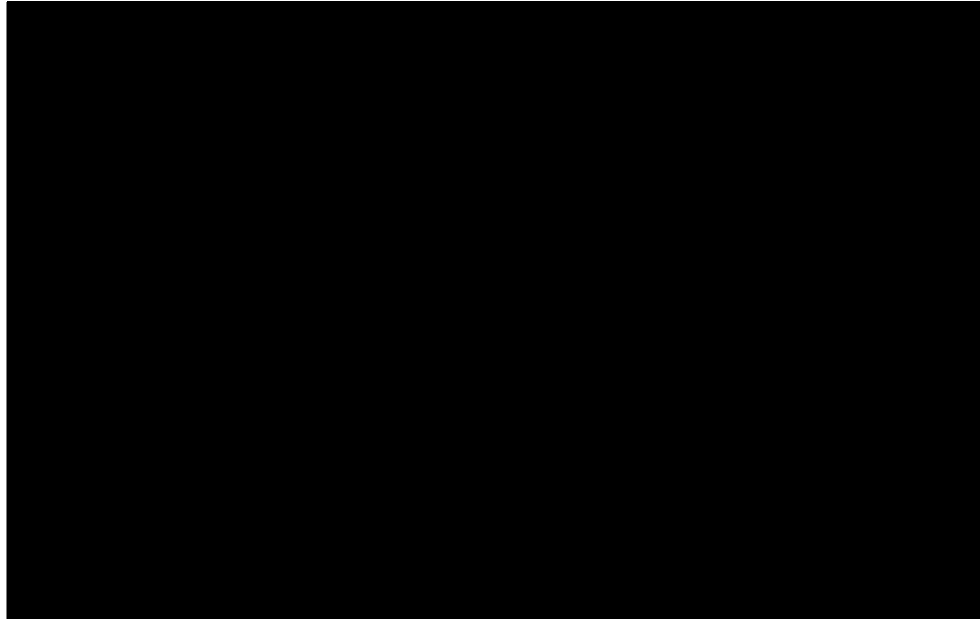
Reasons for dissatisfaction with Face ID for unlocking



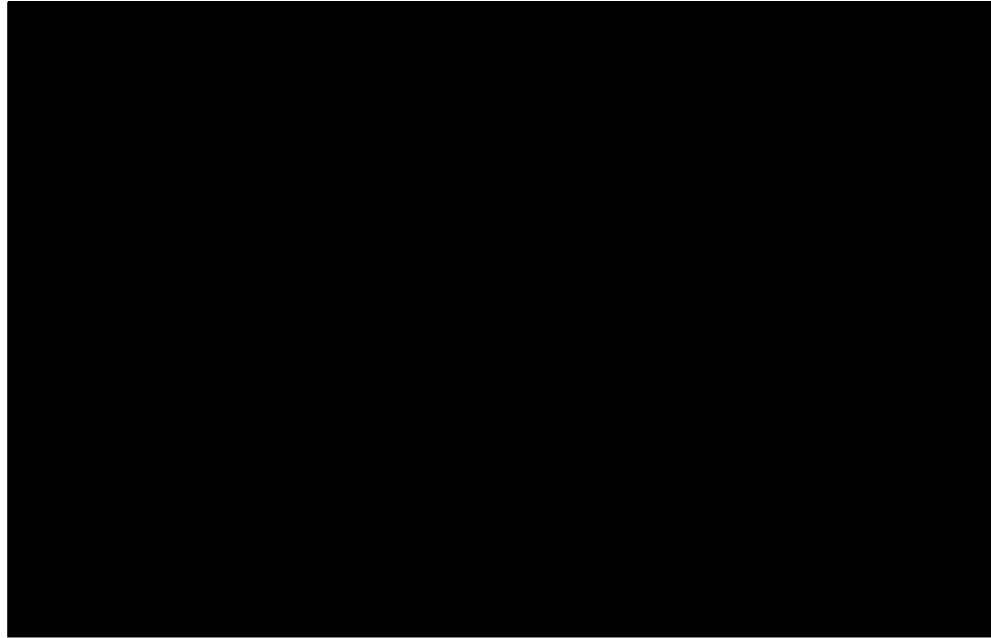
Overall satisfaction with Apple Pencil



Overall satisfaction with Apple Pencil



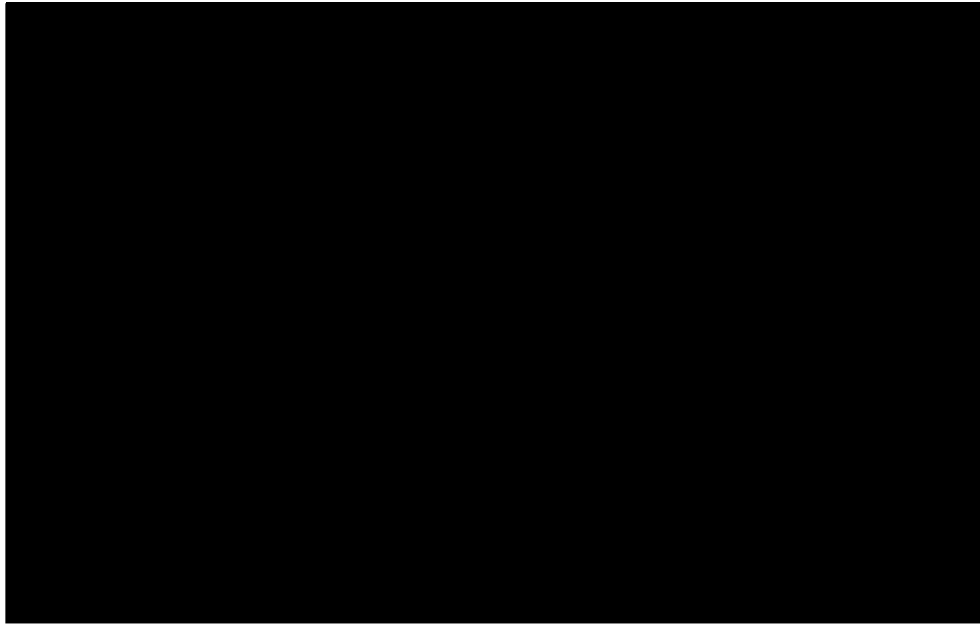
Overall satisfaction with Smart Keyboard Folio



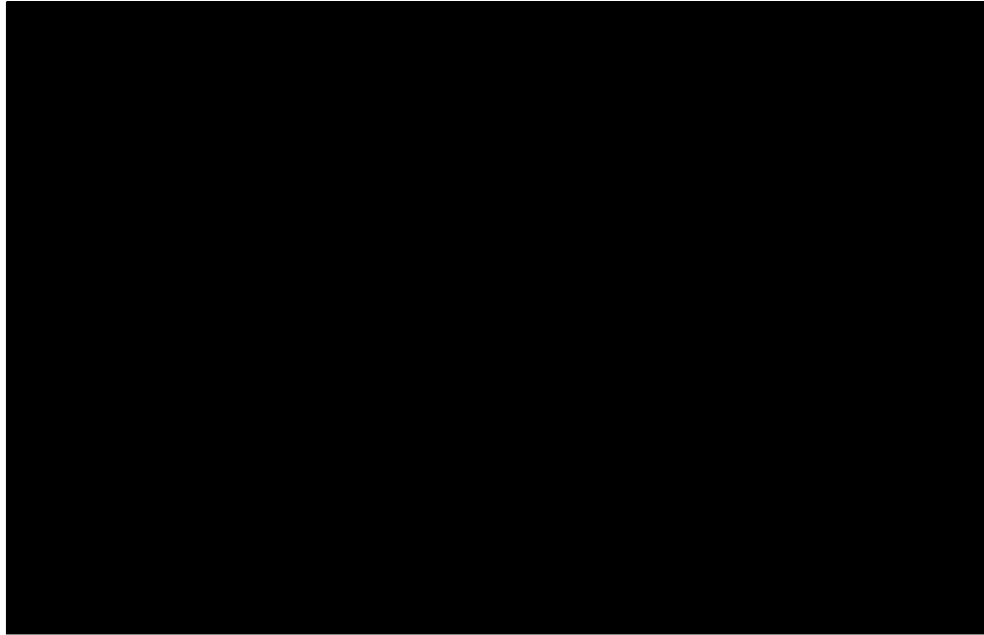
Detailed Chapters

Acquisition

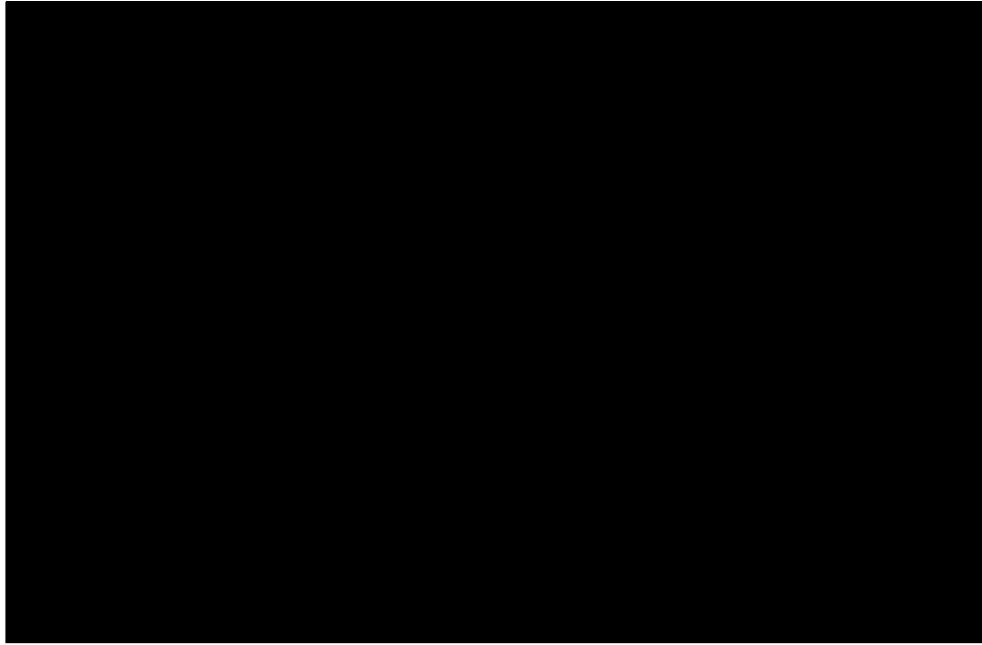
Acquisition method



Acquisition method



Acquisition method

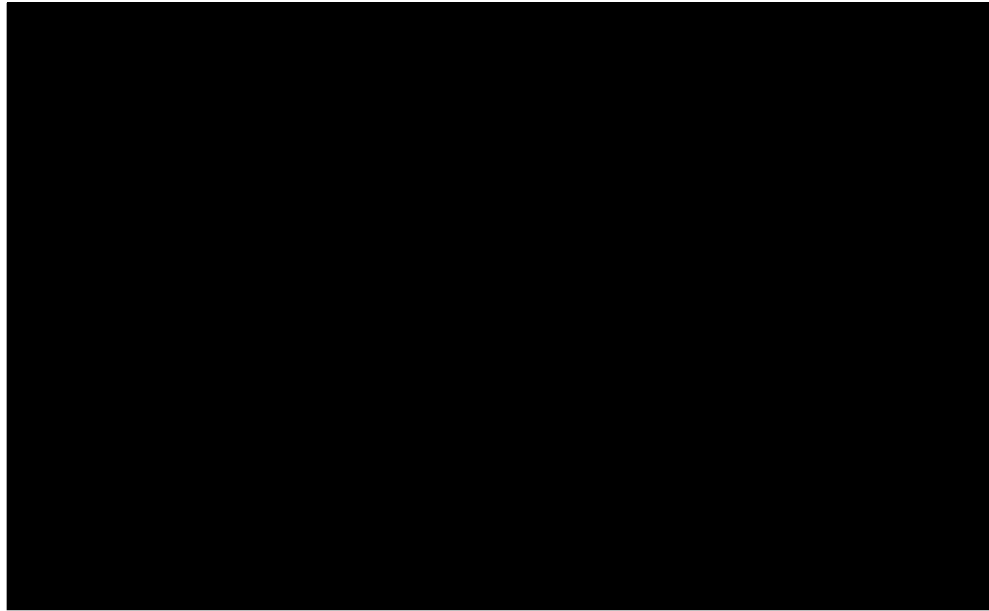


Acquisition method

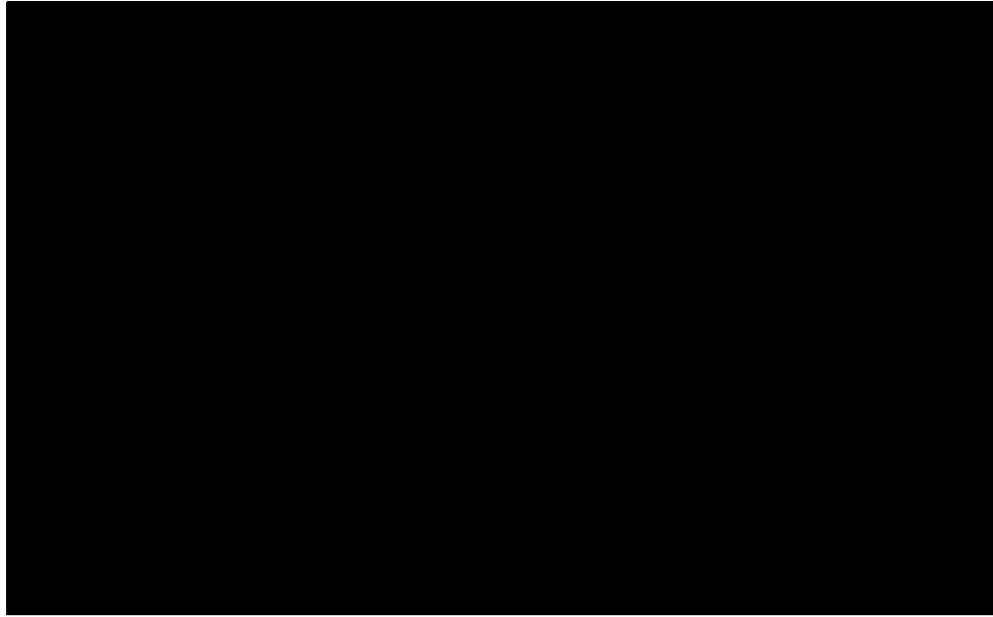


Acquisition trends

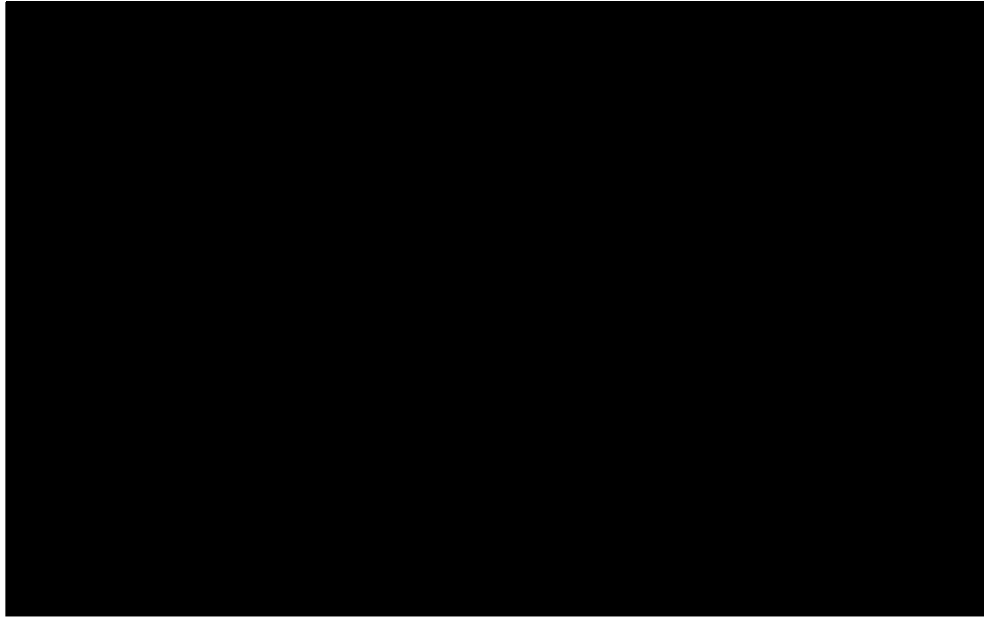
Received as gift



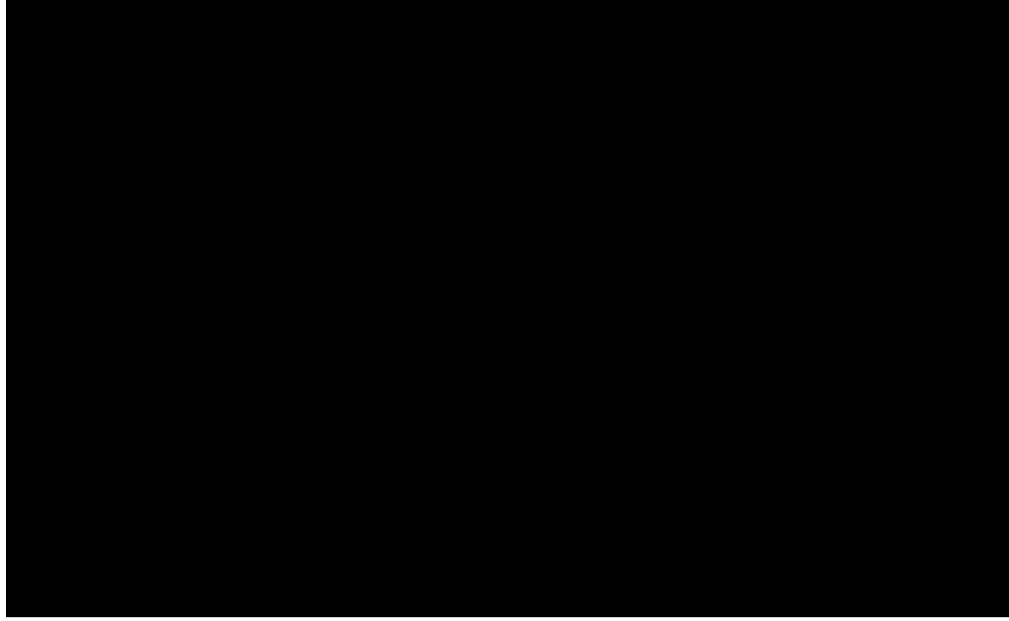
Age of person iPad was purchased for



Cellular data plan activation status

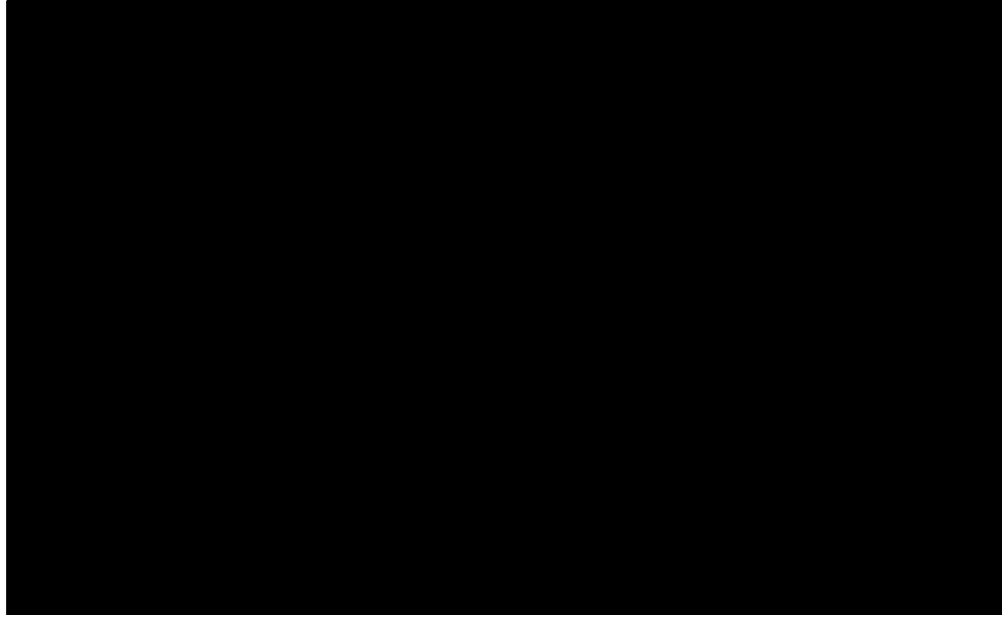


Purchase method



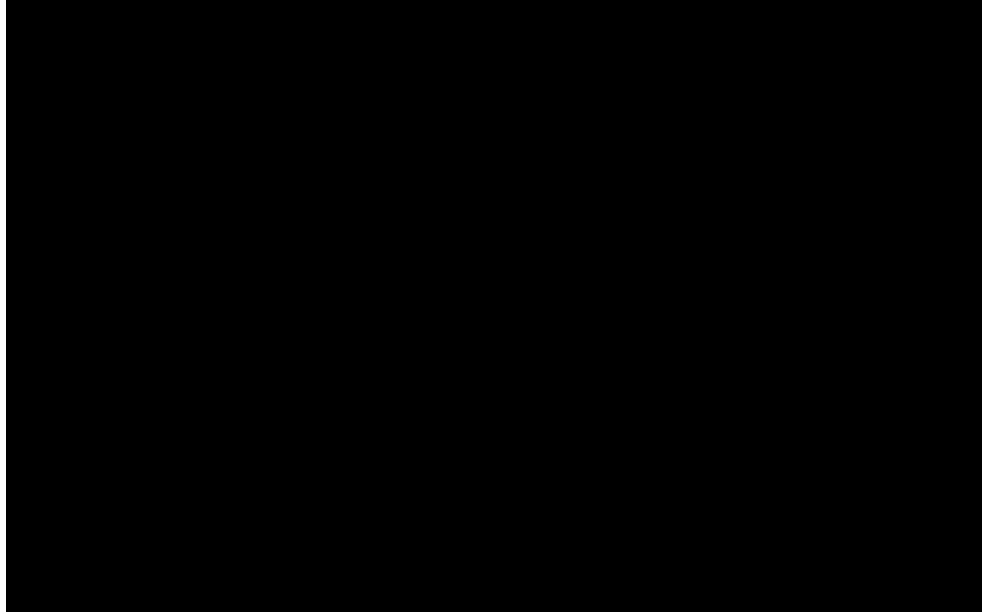
Buy Mix

Buy mix



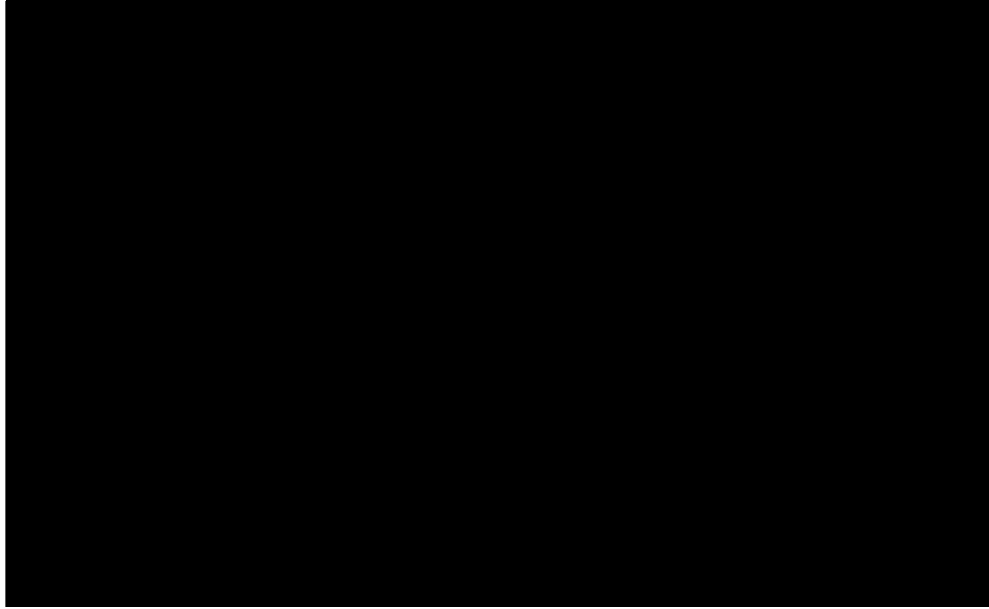
Buy mix trends

First tablet



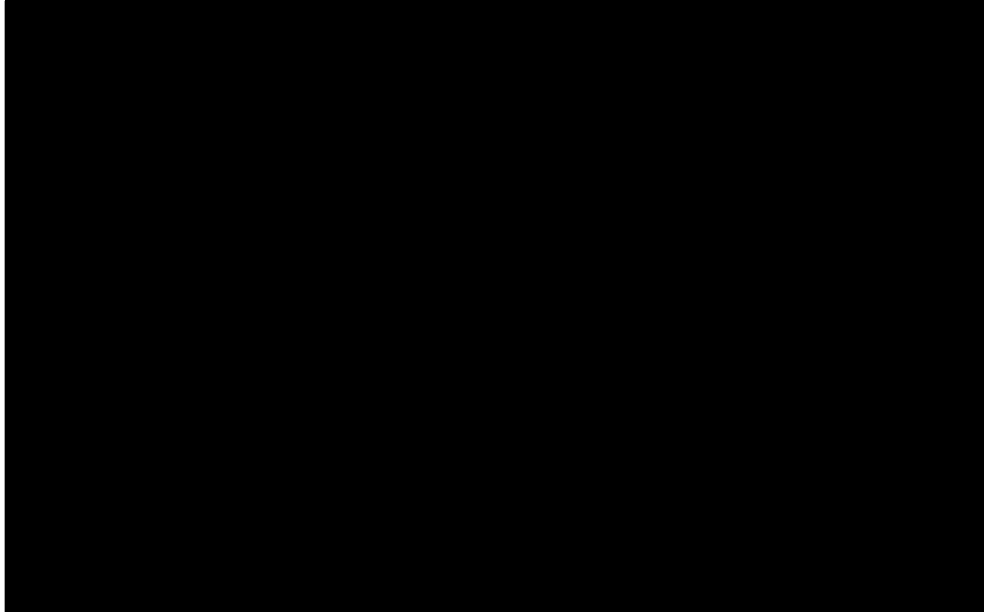
Buy mix

First tablet



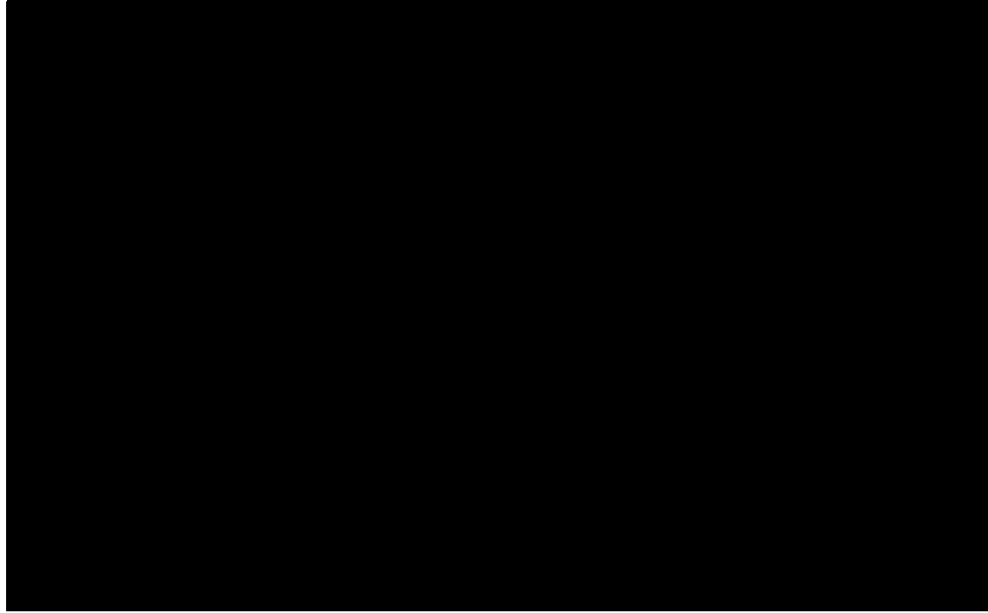
Buy mix

Replacing device

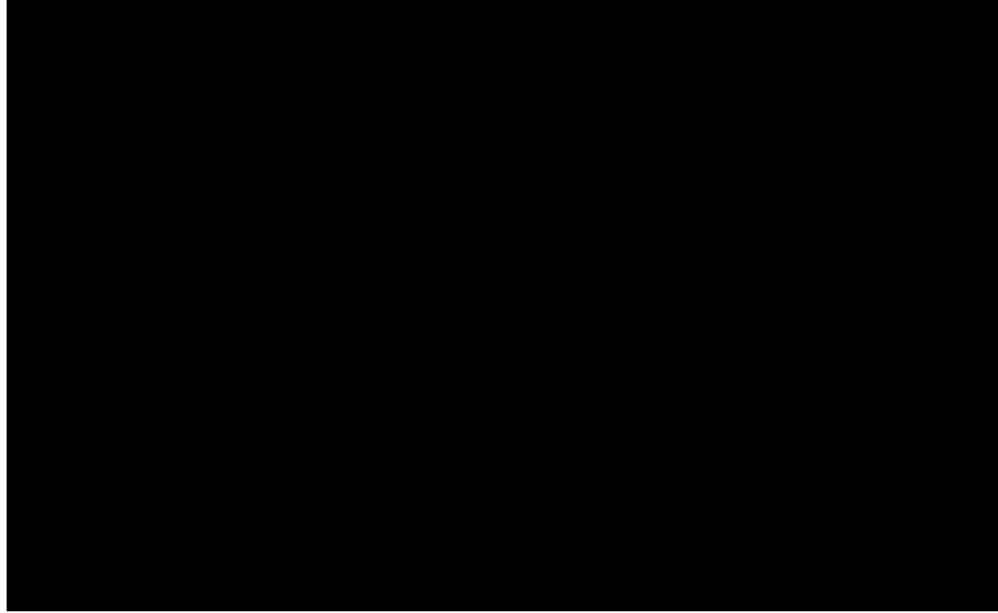


Buy mix

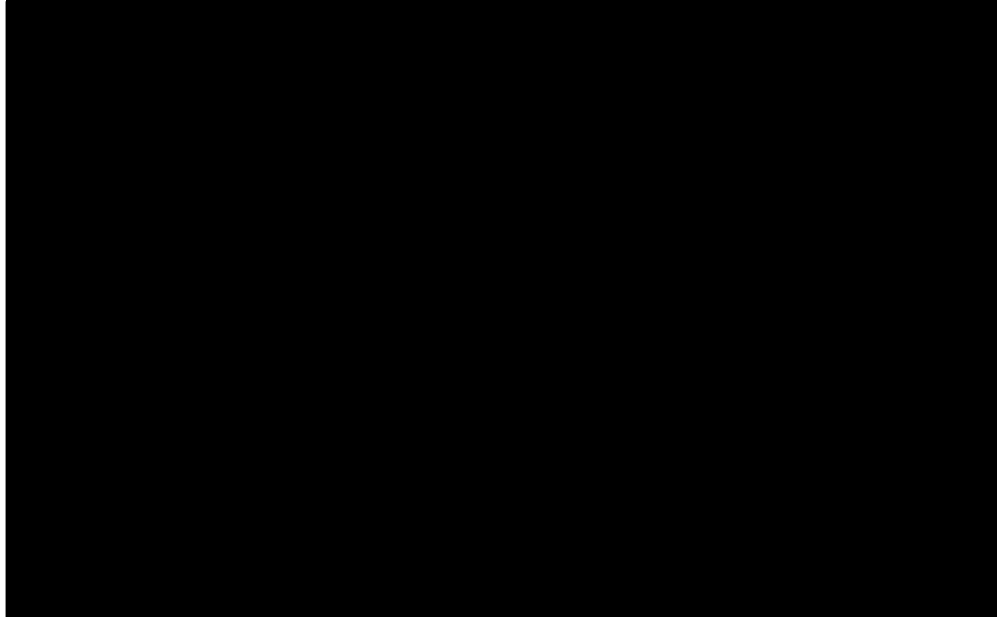
Additional device



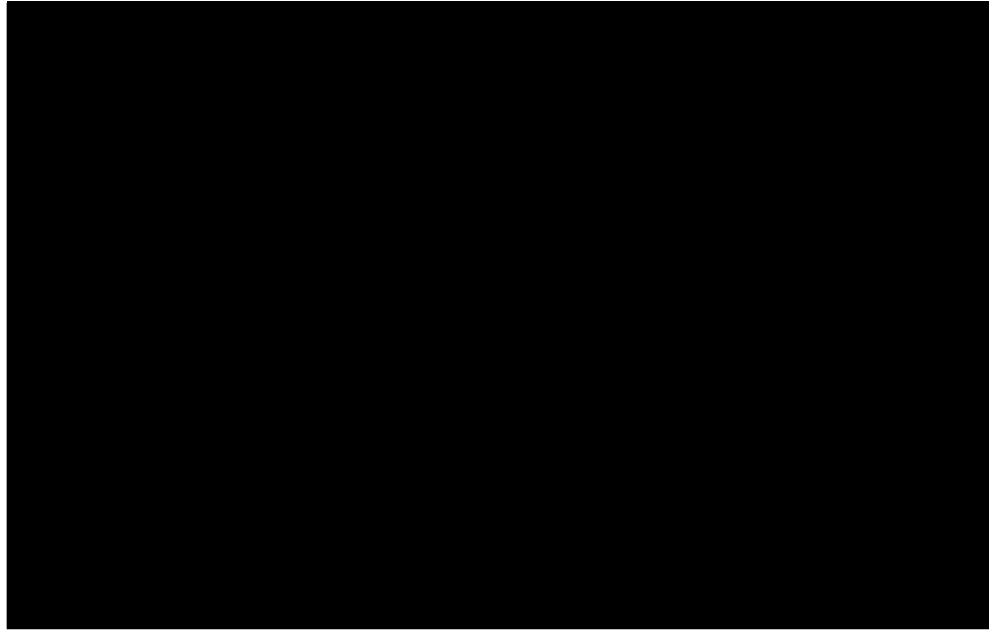
First iPad



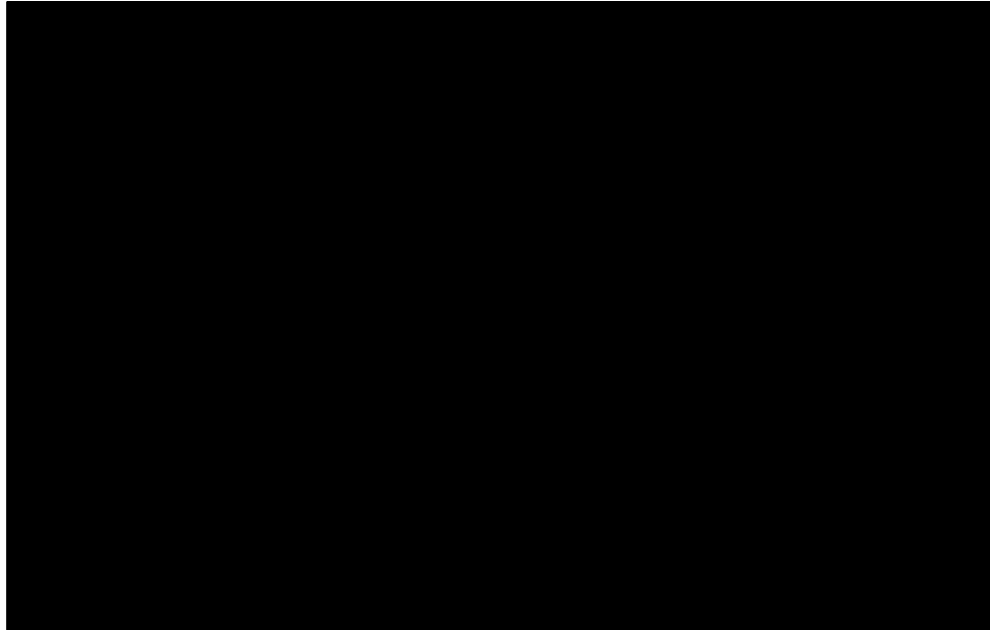
First iPad trends



First iPad



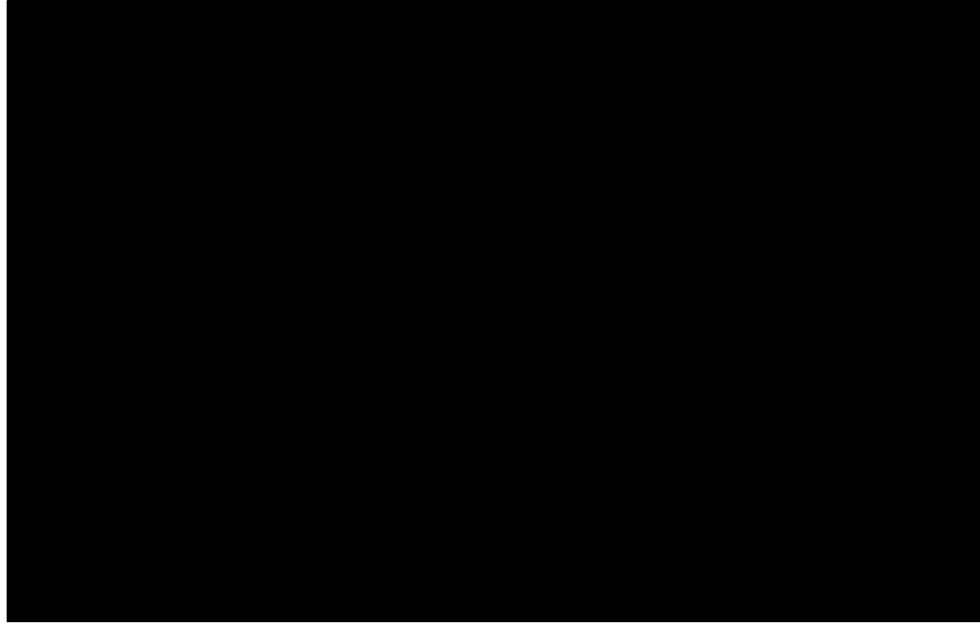
First iPad trends



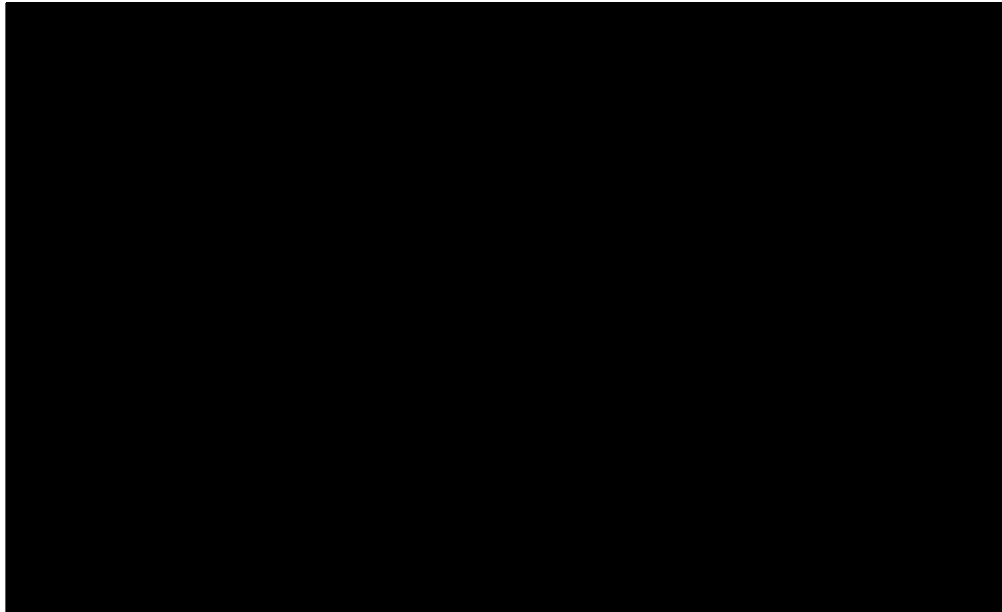
First Apple product



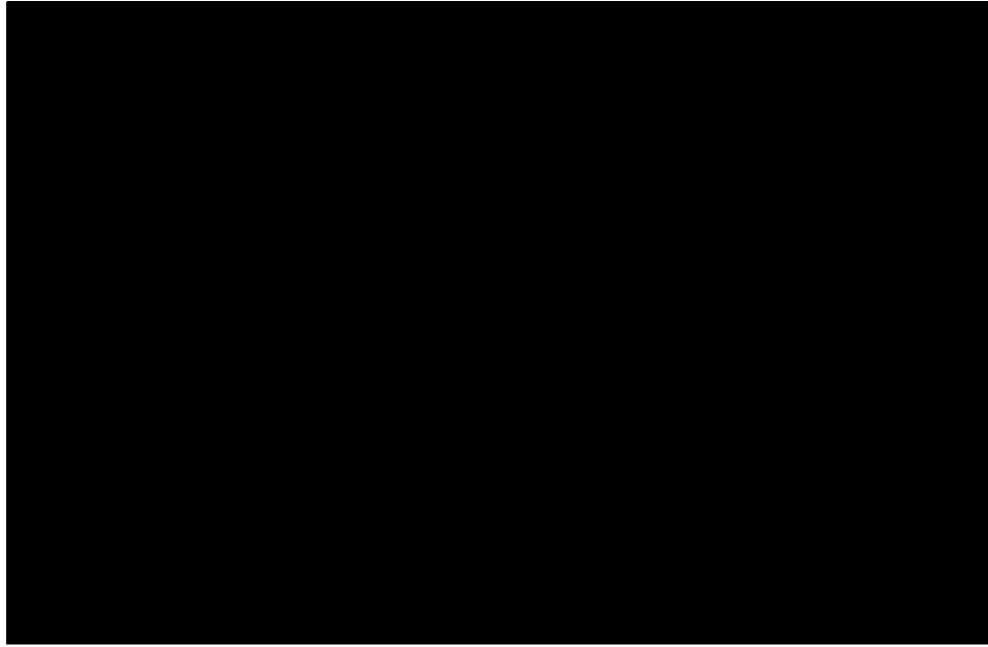
First Apple product



Device Replaced



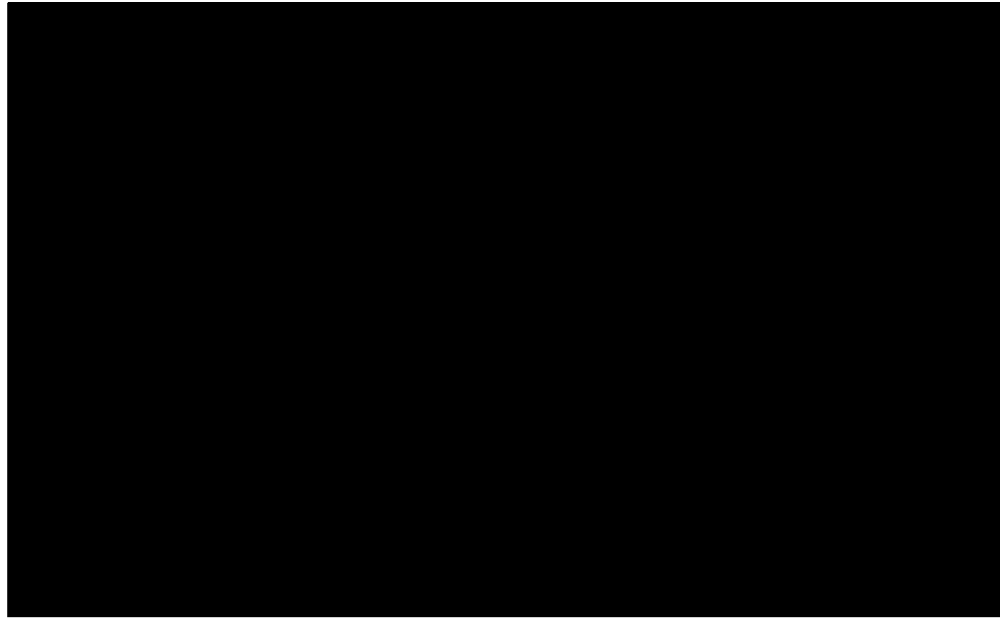
Device Replaced



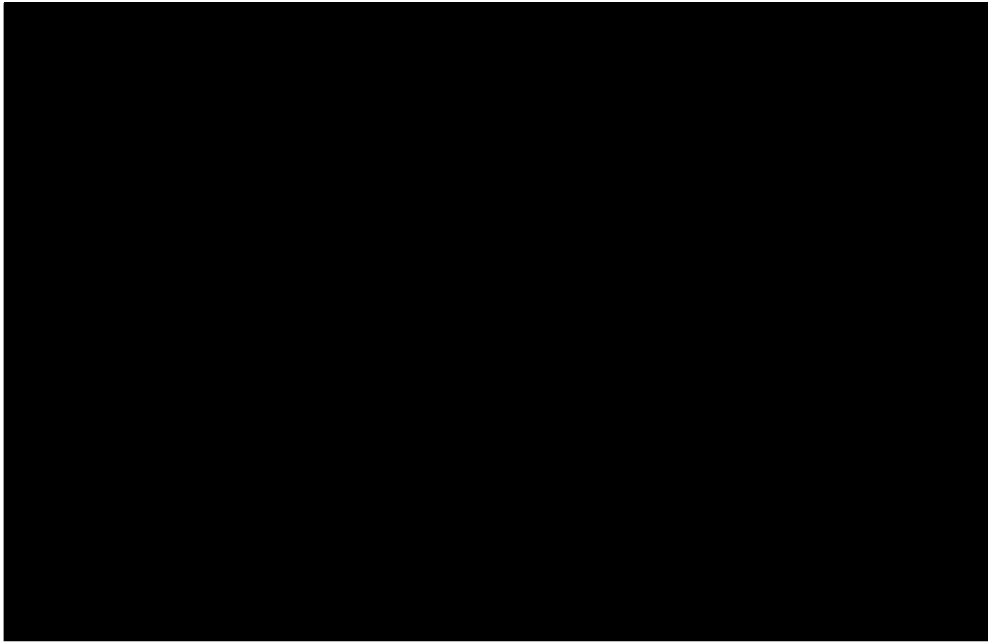
Device Replaced



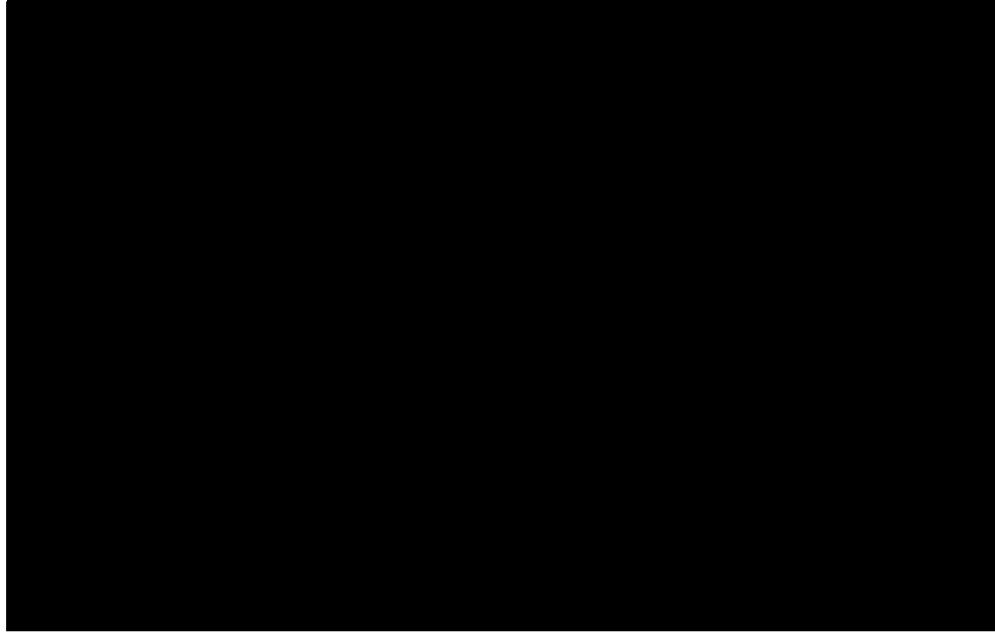
Device Replaced



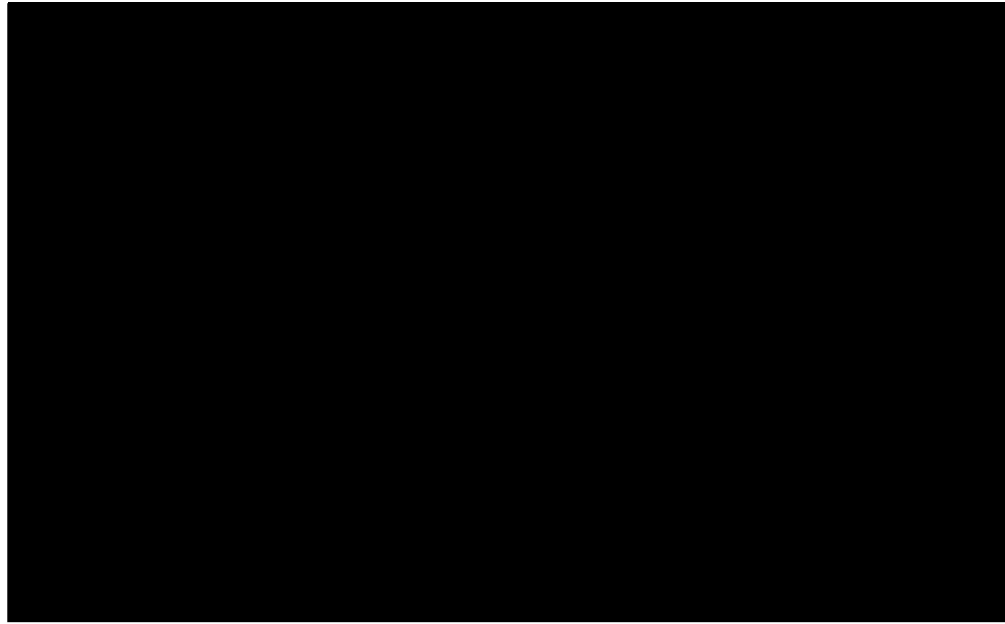
Device Replaced



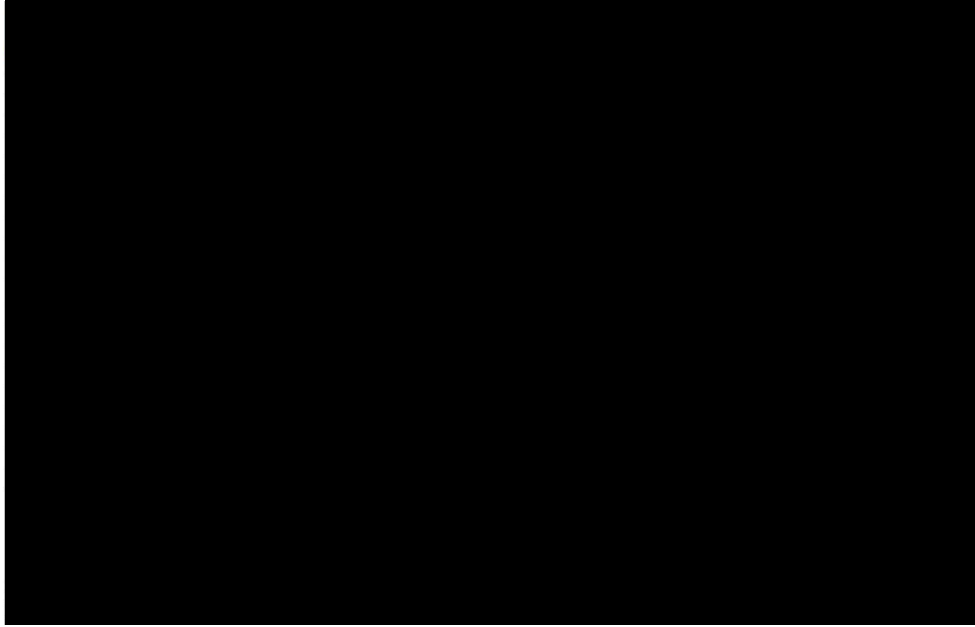
Device Replaced



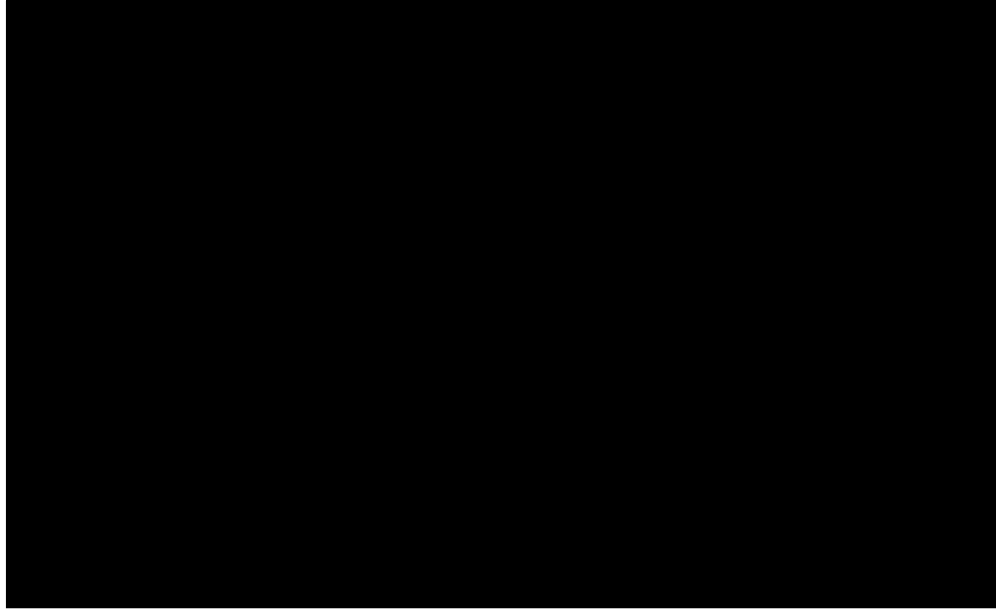
iPad model replaced (among those who replaced an iPad)



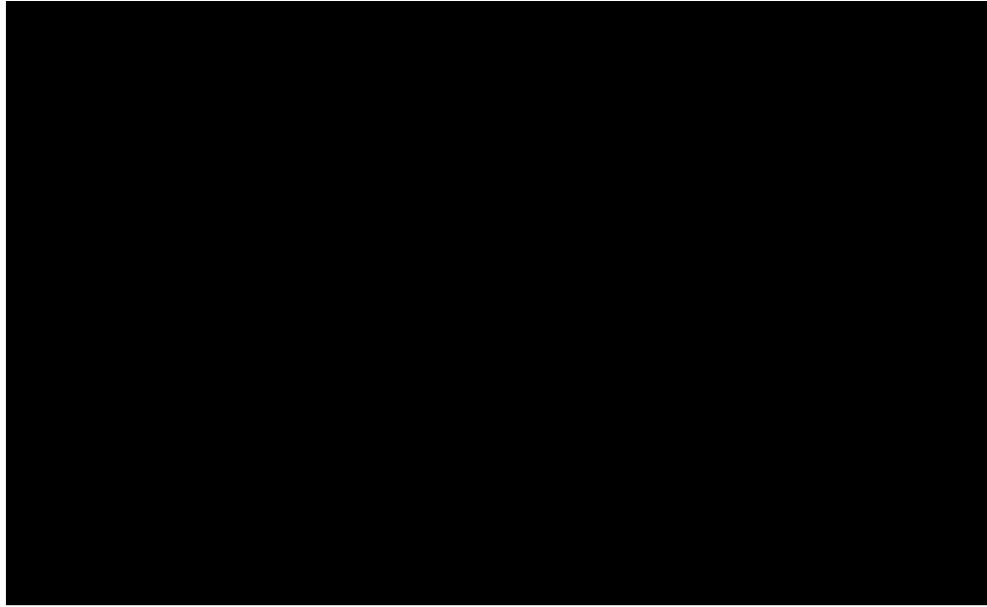
iPad model replaced (among those who replaced an iPad)



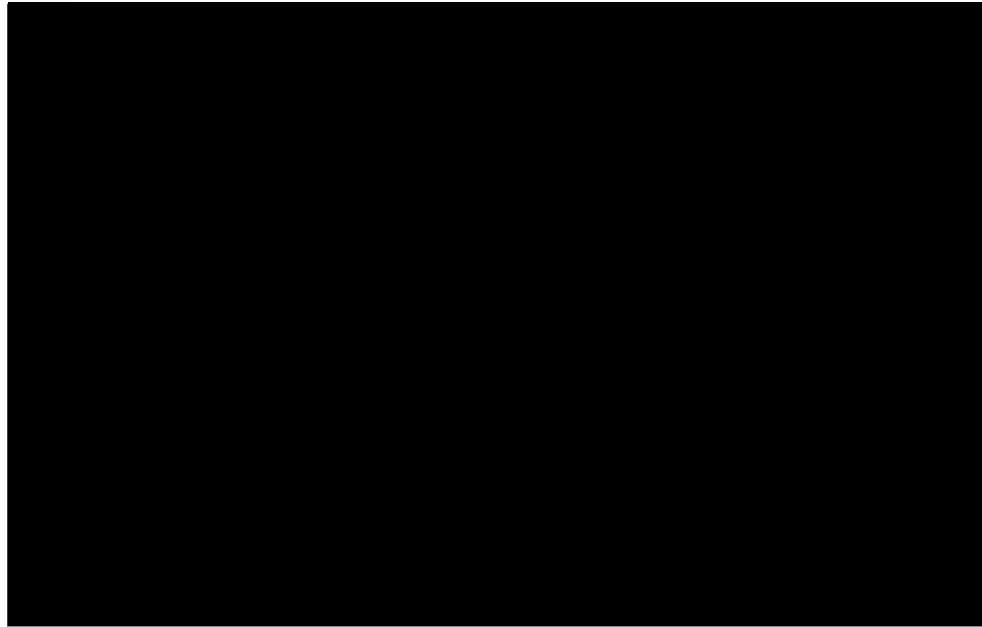
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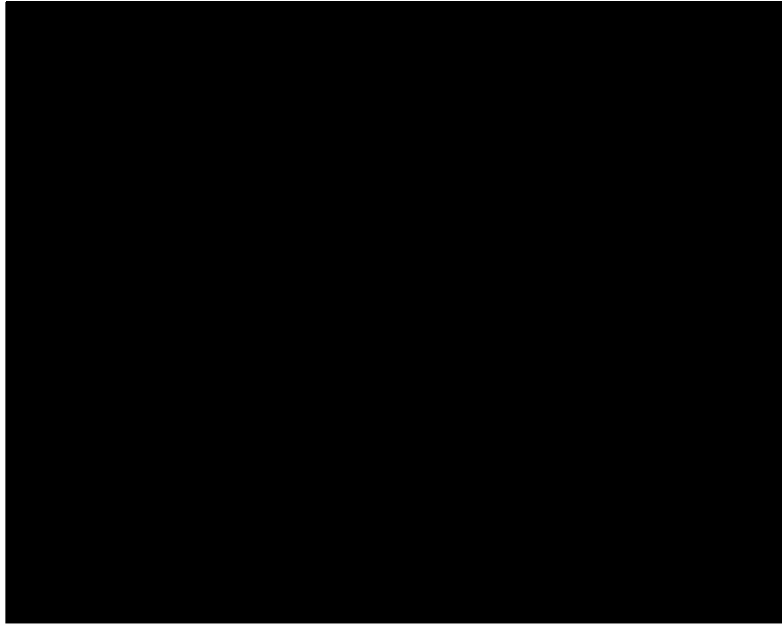


Tablet brand replaced

(among those replacing a competitor tablet, but not an



Brand of the Windows laptop replaced by iPad
(among those replacing a Windows laptop, but not a



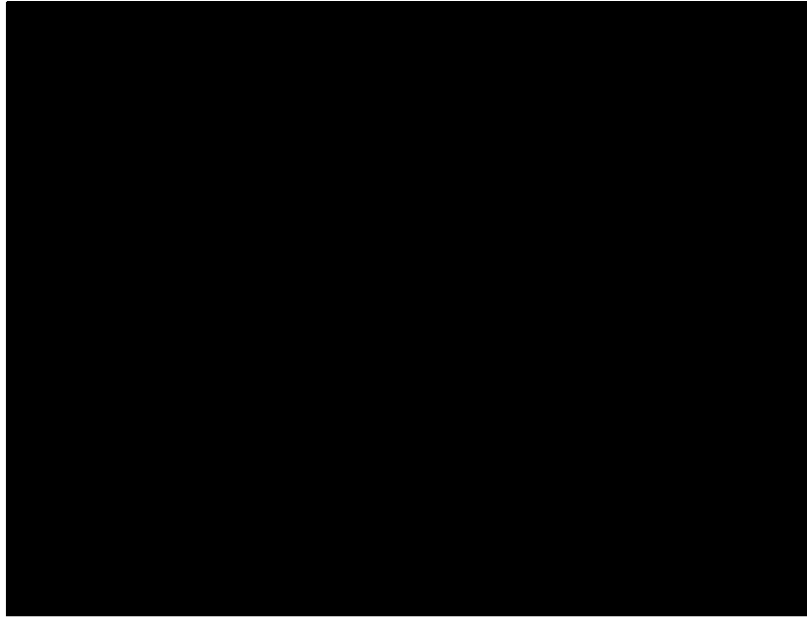
APPLE
CONFIDENTIAL X

Brand of the 2-in-1 Windows laptop replaced by iPad
(among those not replacing a tablet, regular Windows



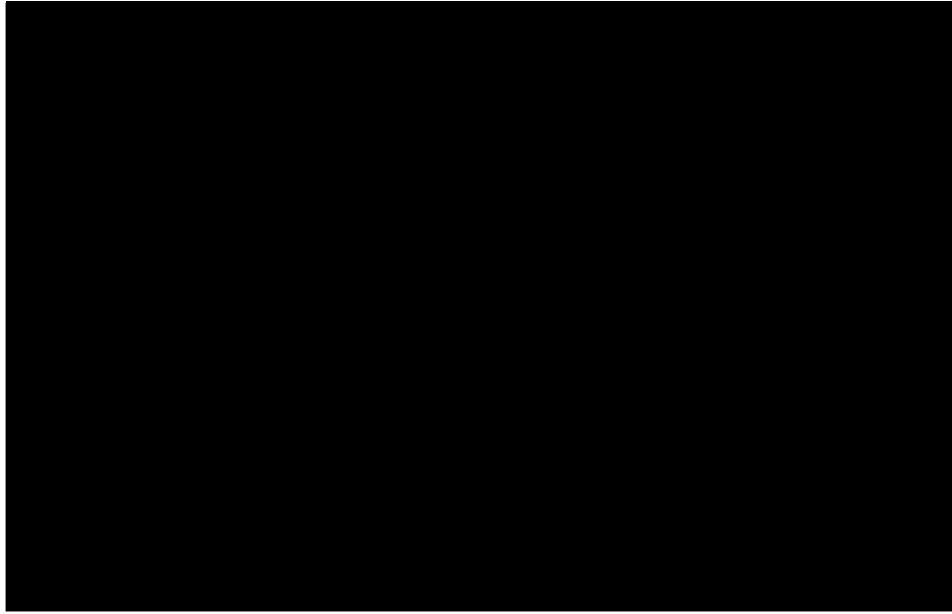
x

Screen size of the Windows laptop replaced by iPad
(among those replacing a Windows laptop, but not a



APPLE
CONFIDENTIAL X

Screen size of the 2-in-1 Windows laptop replaced by
iPad

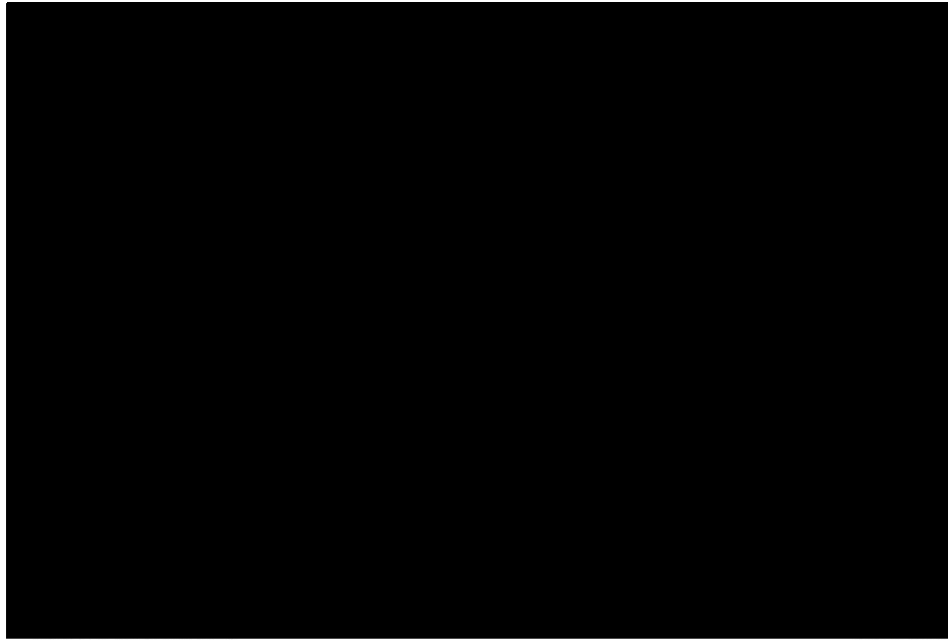


x

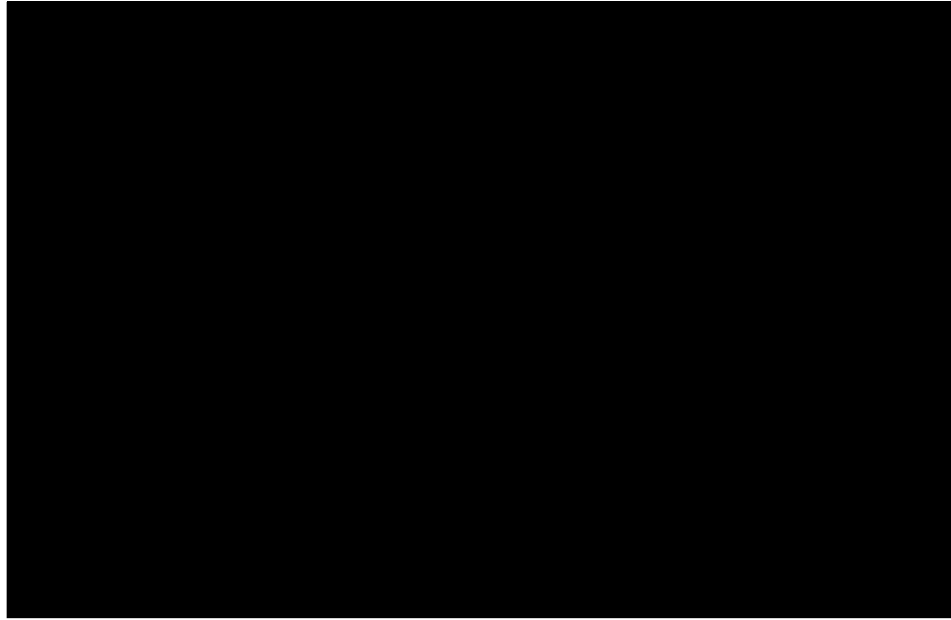
Screen size of the Mac notebook replaced by iPad
(among those not replacing a tablet, any Windows



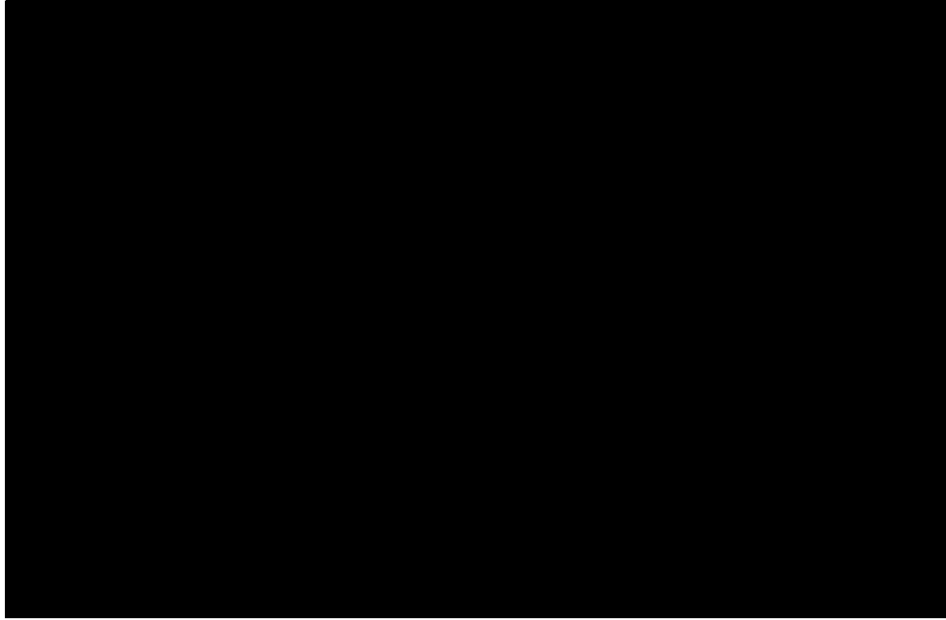
Reason for replacing the Windows laptop with the iPad



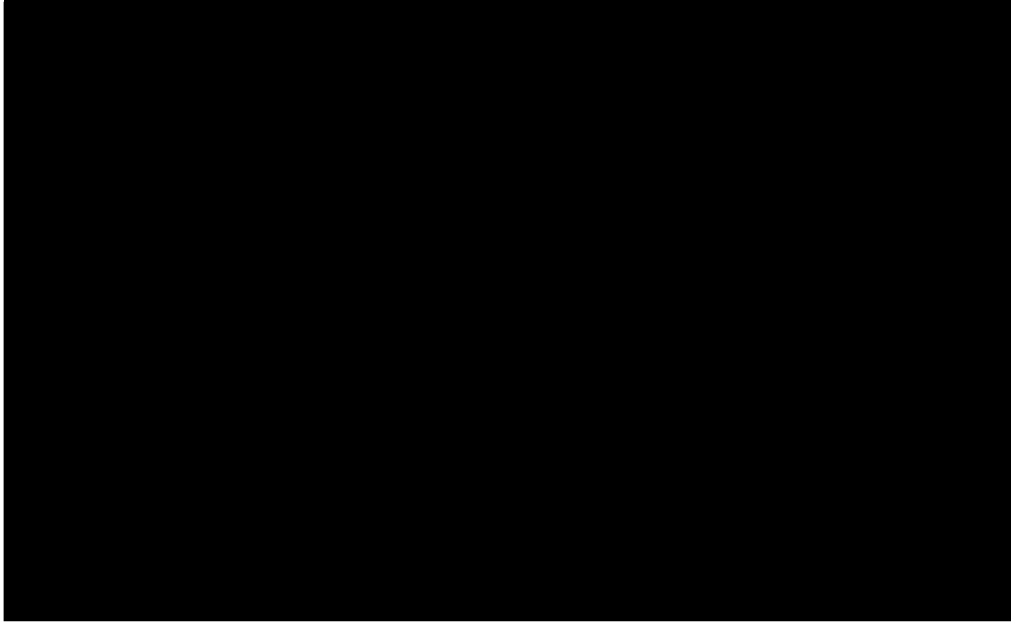
Reason for replacing the 2-in-1 Windows laptop with the iPad



Reason for replacing the Mac notebook with the iPad

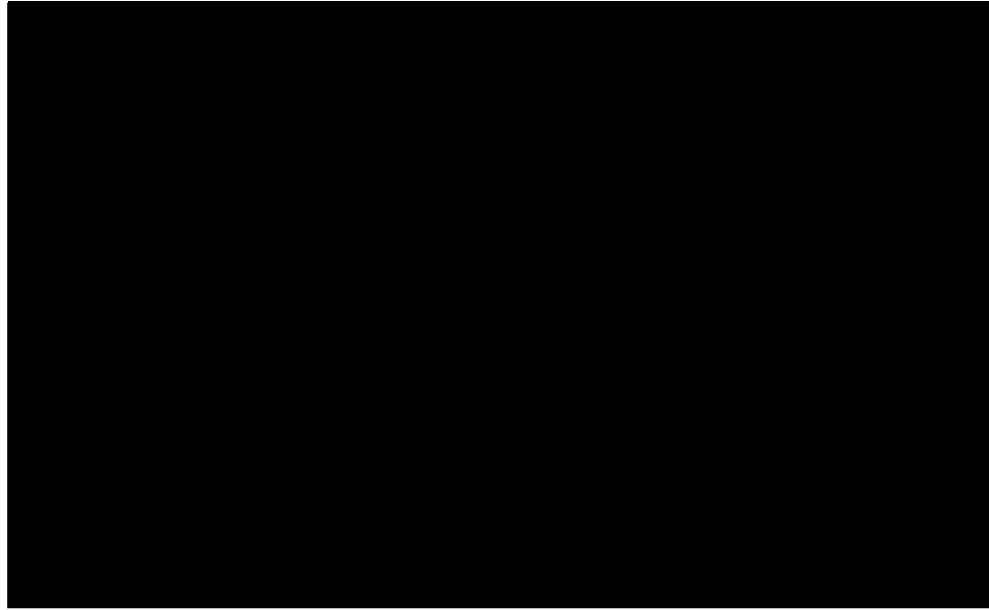


Length of ownership of replaced tablet

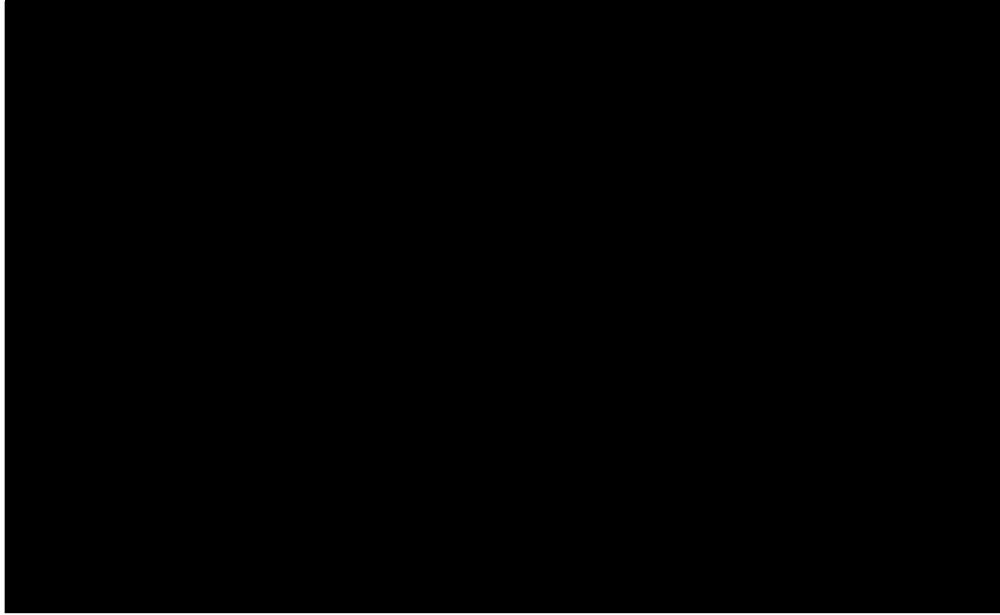


Length of ownership of replaced tablet

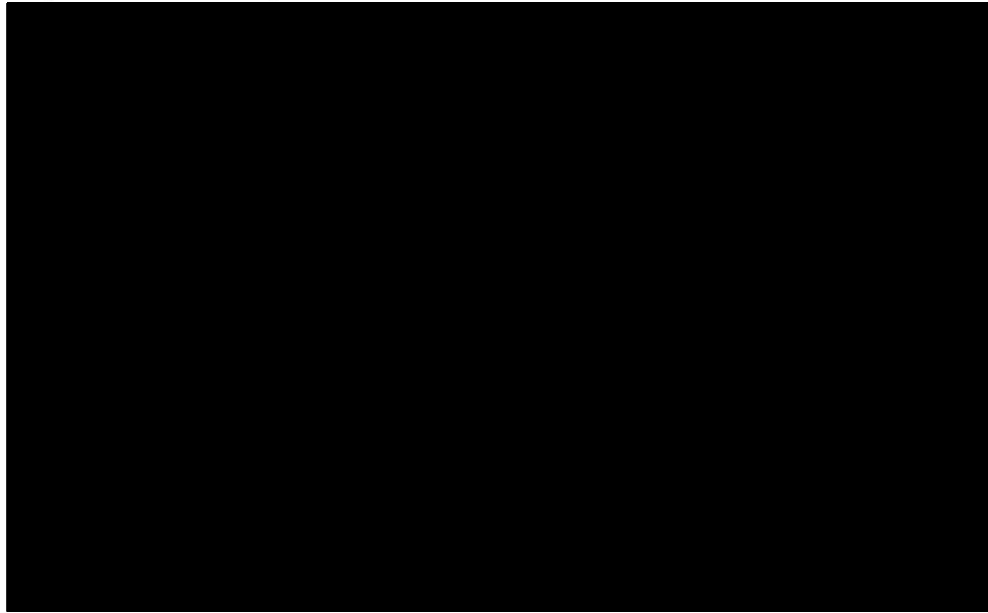
by model acquired



Length of ownership of replaced iPad (among those who replaced an iPad)



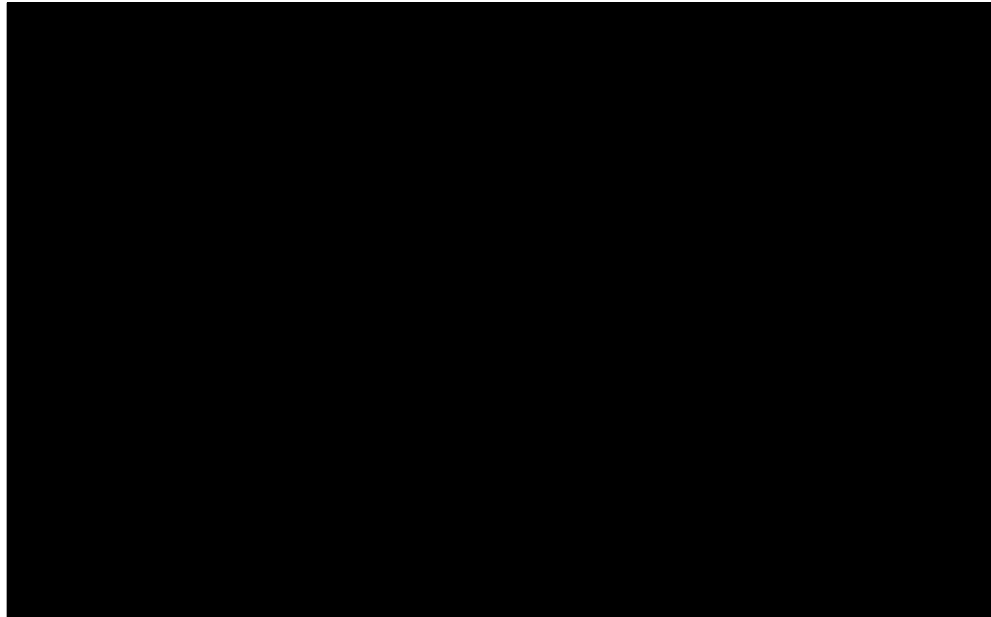
Length of ownership of replaced iPad (among those who
replaced an iPad)
by iPad model acquired



Length of ownership of replaced tablet (among those
who replaced a competitor tablet, but not an iPad)



Length of ownership of replaced Windows laptop (among
those who did not replace a tablet)



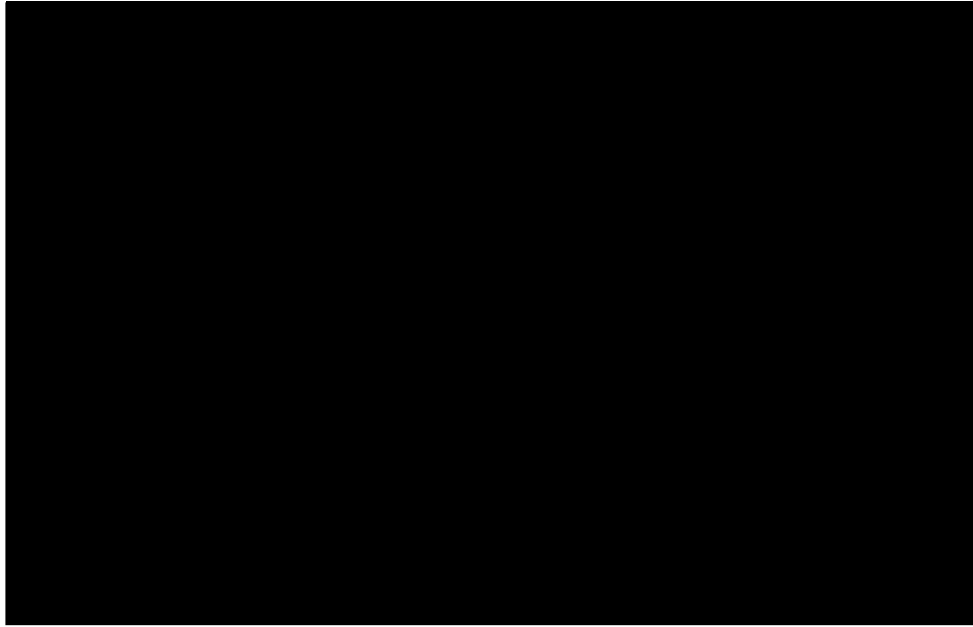
Length of ownership of replaced 2-in-1 Windows laptop
(among those who did not replace a tablet, Win laptop,



Length of ownership of replaced Mac notebook (among
those who did not replace a tablet, any Win laptop, or

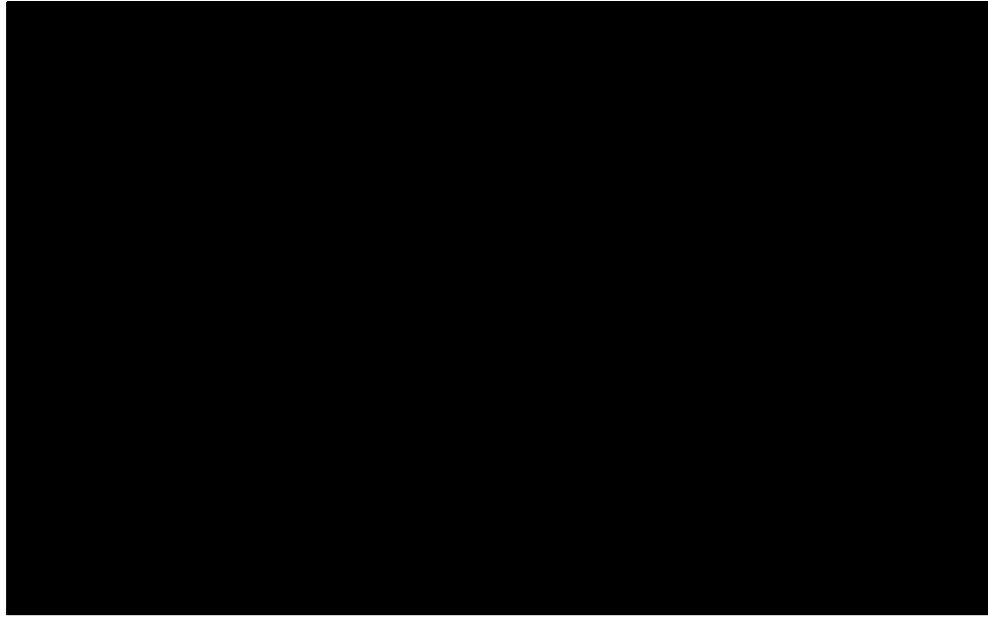


Disposition of replaced tablet

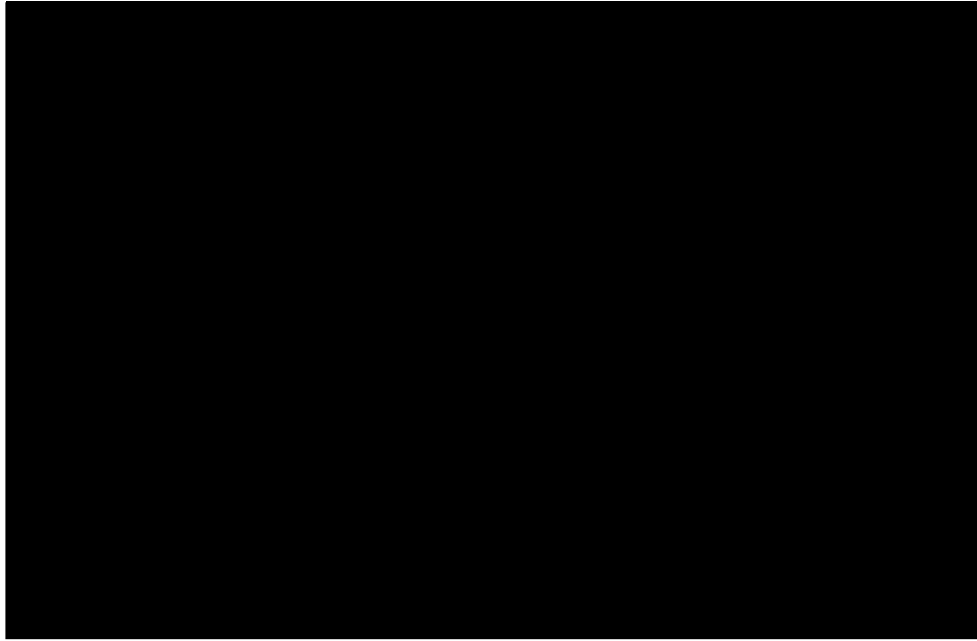


Overall Satisfaction

Overall satisfaction



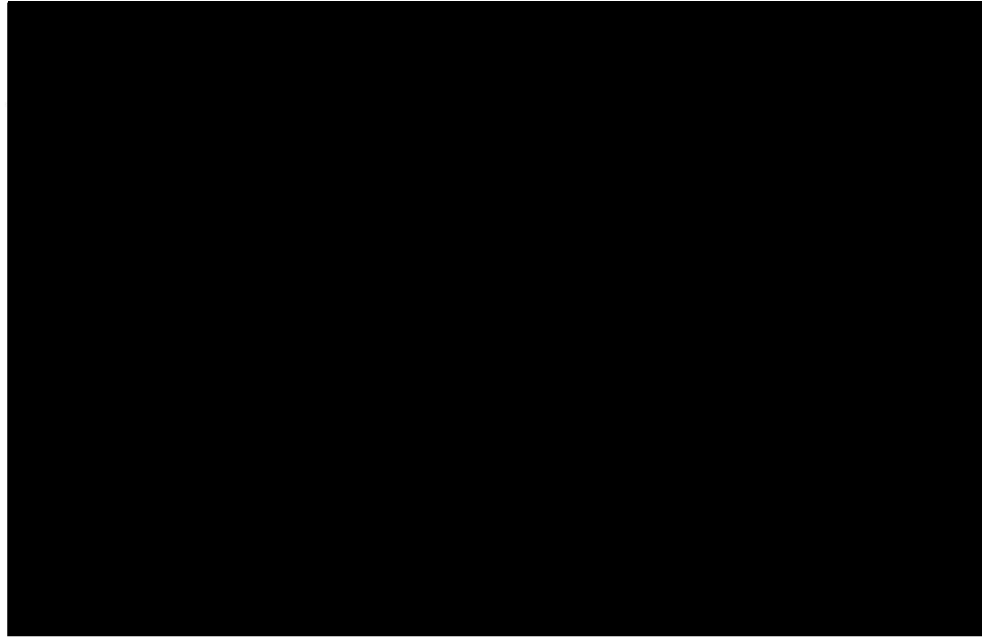
Overall satisfaction



Overall satisfaction

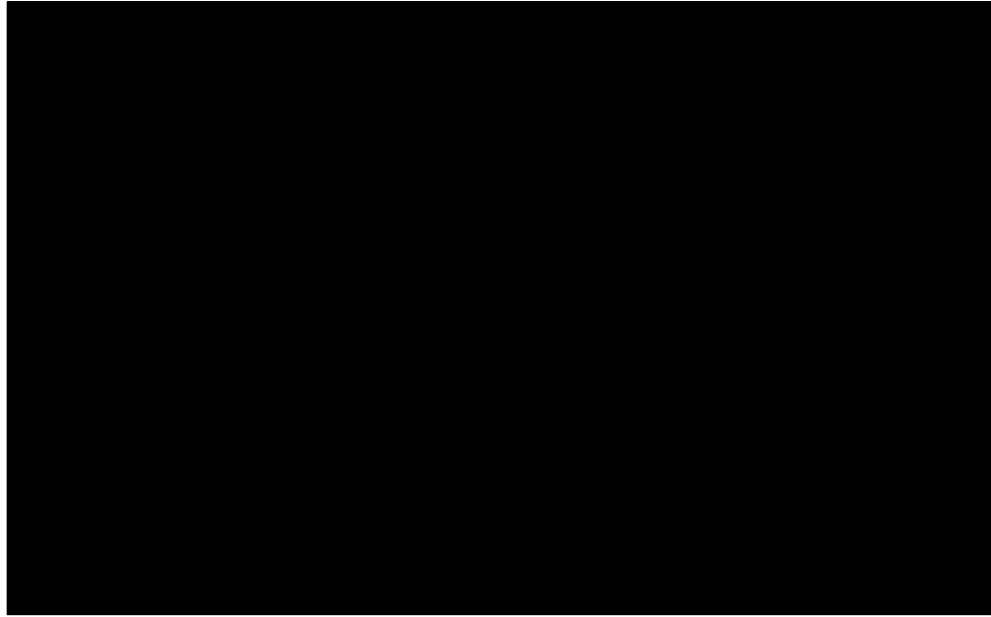


Overall satisfaction



Overall satisfaction

Very satisfied, Somewhat satisfied



Overall satisfaction trend

Very satisfied, Somewhat satisfied



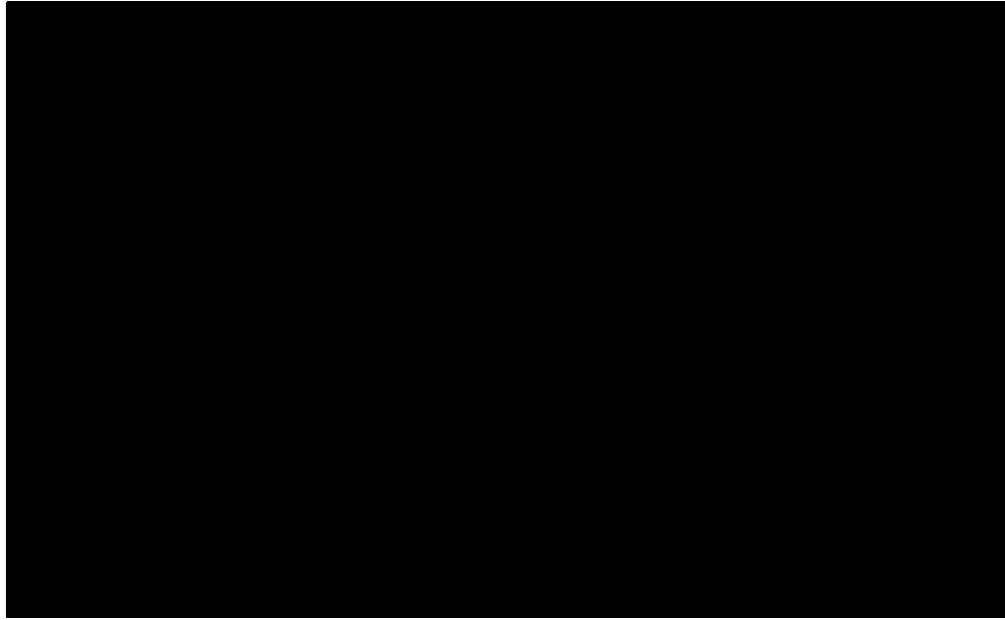
Overall satisfaction trend

Very satisfied, Somewhat satisfied



Overall satisfaction trend

Very satisfied, Somewhat satisfied



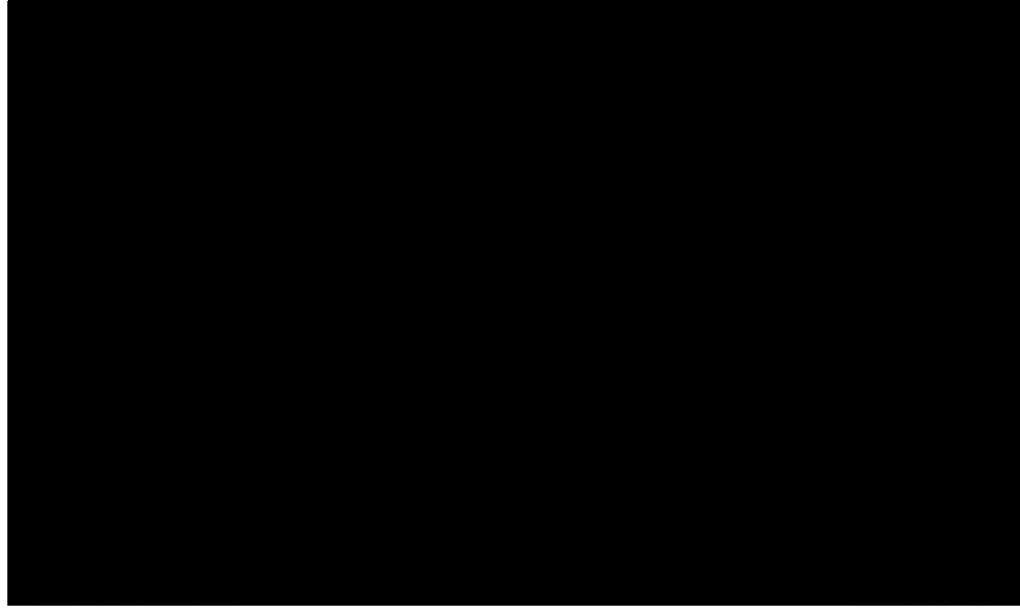
Overall satisfaction trend

Very satisfied, Somewhat satisfied



Overall satisfaction trend

Very satisfied, Somewhat satisfied



Overall satisfaction trend

Very satisfied, Somewhat satisfied



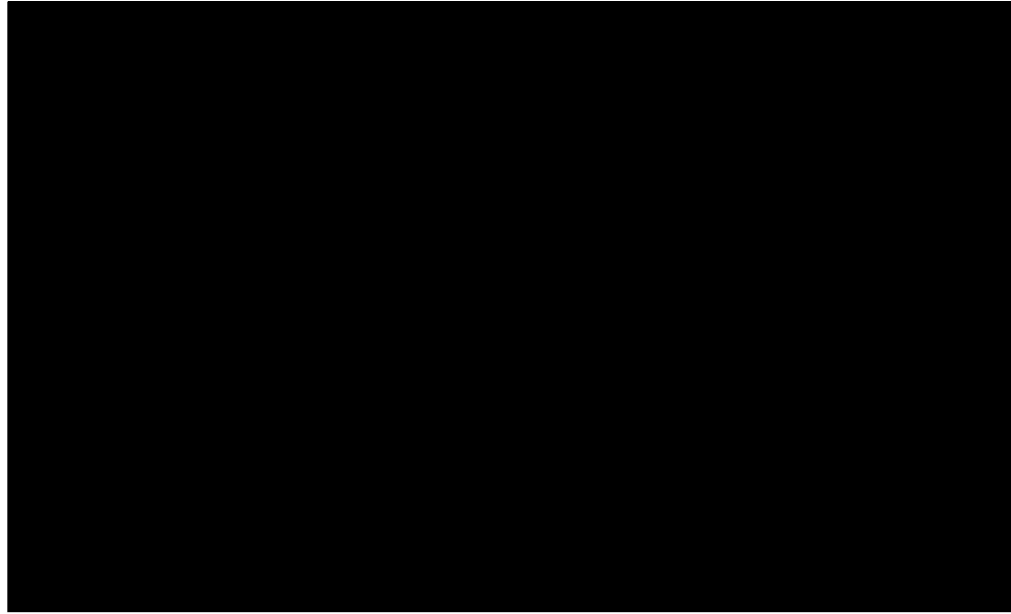
Overall satisfaction trend

Very satisfied, Somewhat satisfied



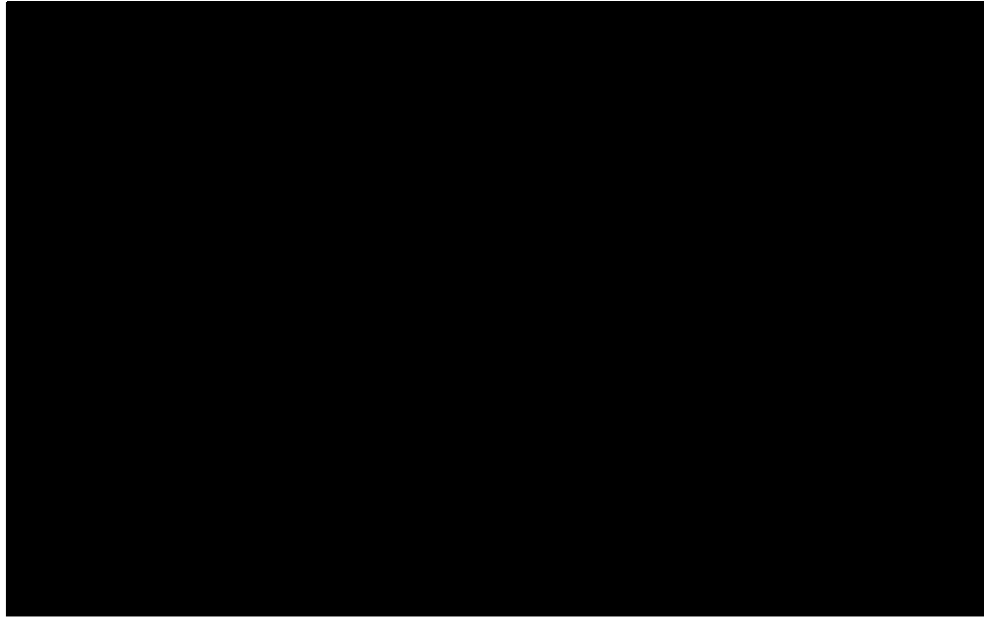
Overall satisfaction

Very satisfied



Overall satisfaction trend

Very satisfied



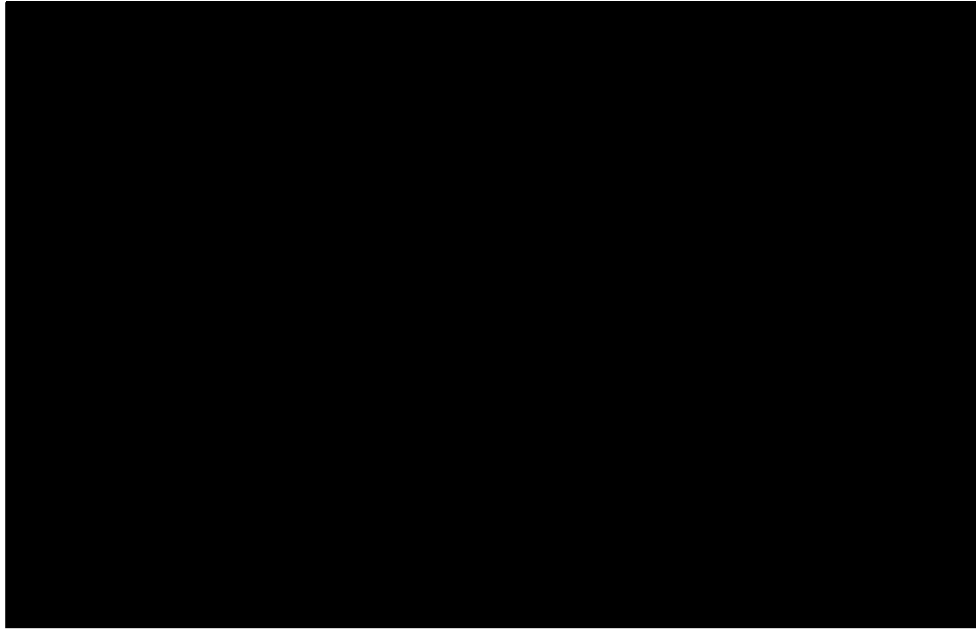
Purchase Journey (triggers, usage intention, consideration)

Purchase triggers

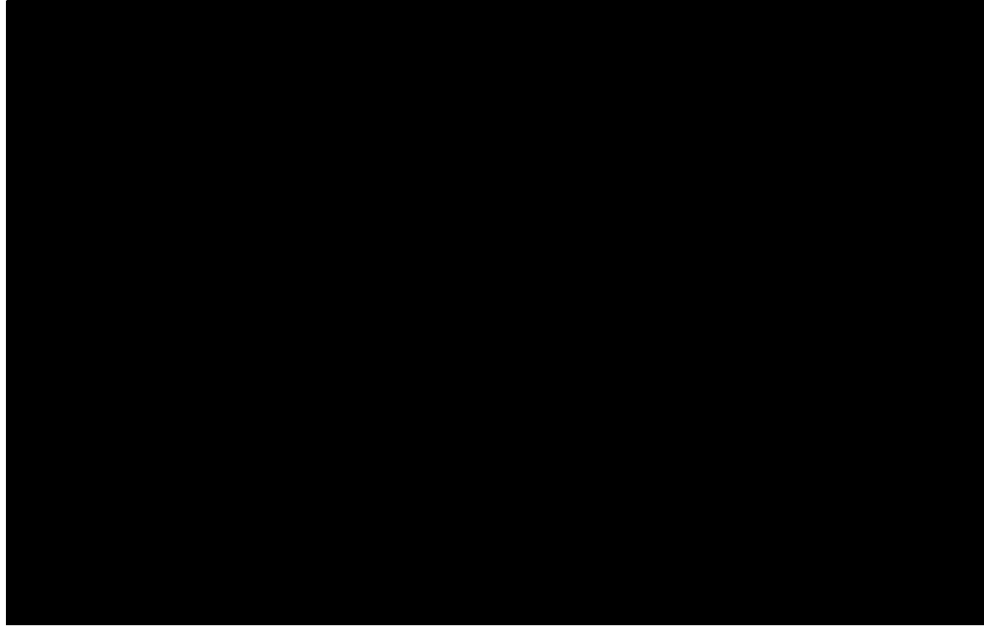
Reason for buying iPad at this time



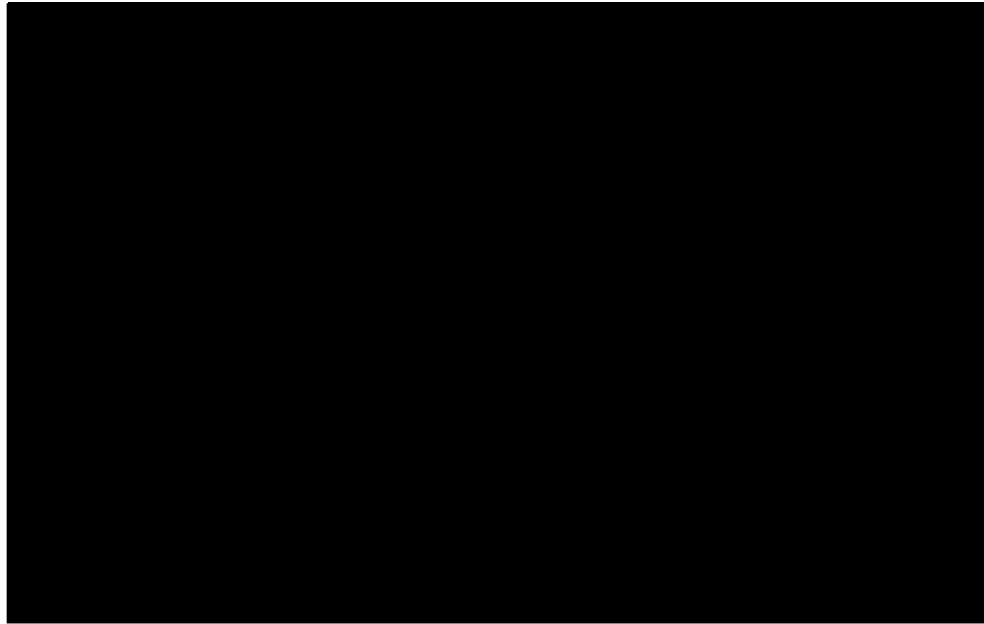
Reason for buying iPad at this time



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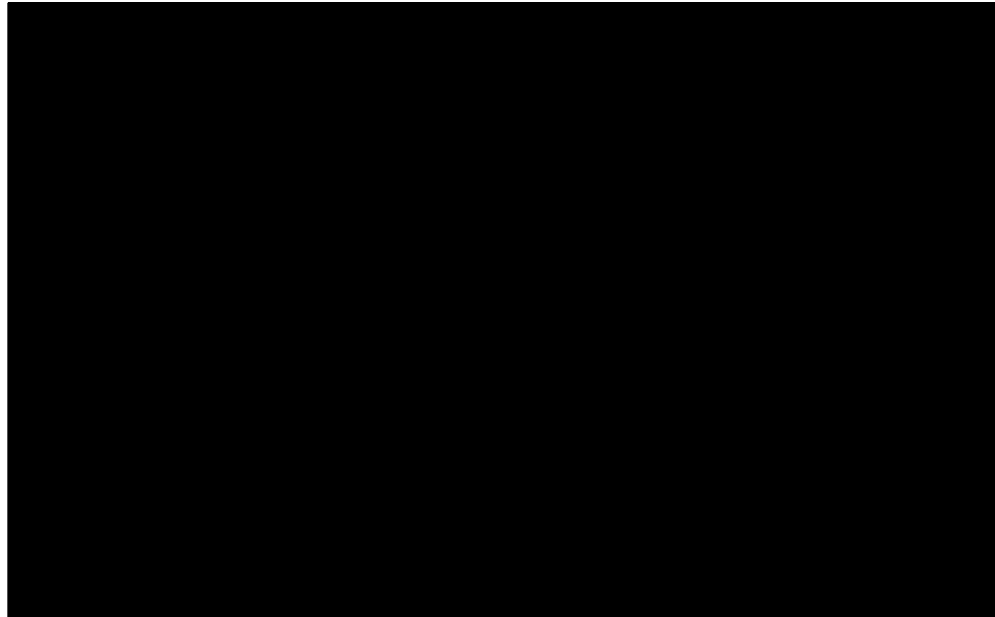


Usage intention

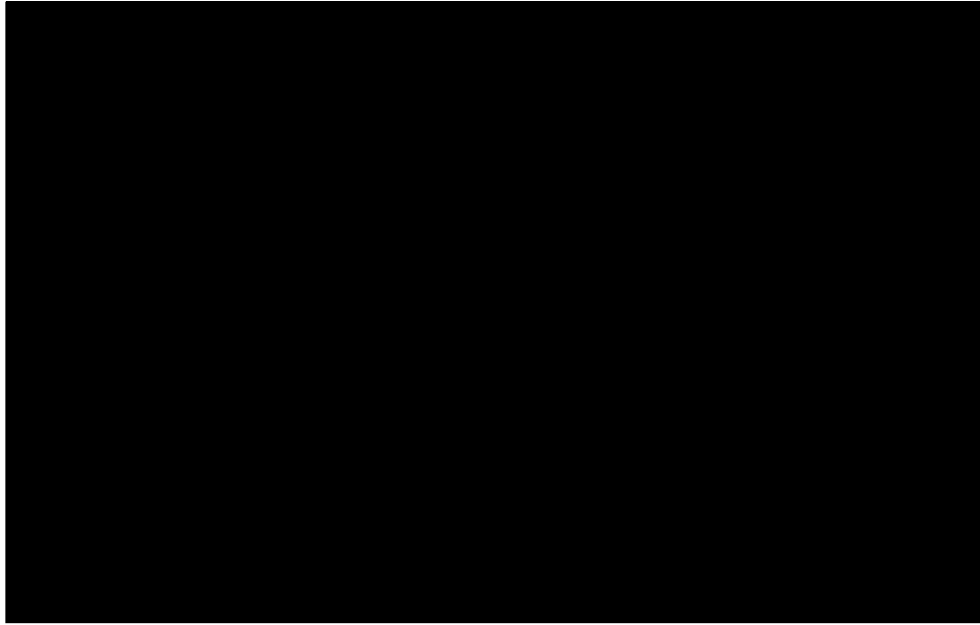
Purposes for buying the iPad



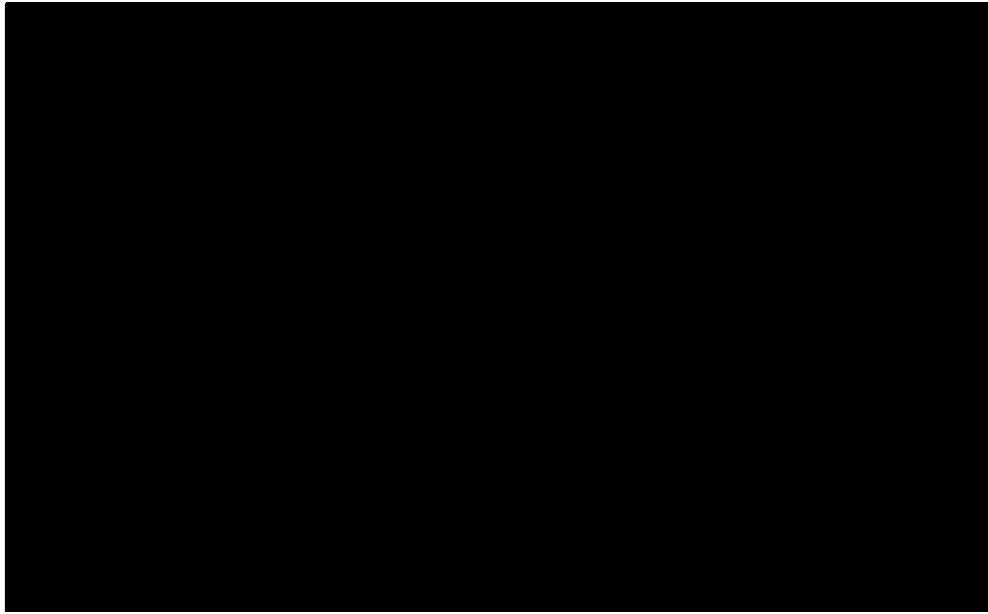
Purposes for buying the iPad



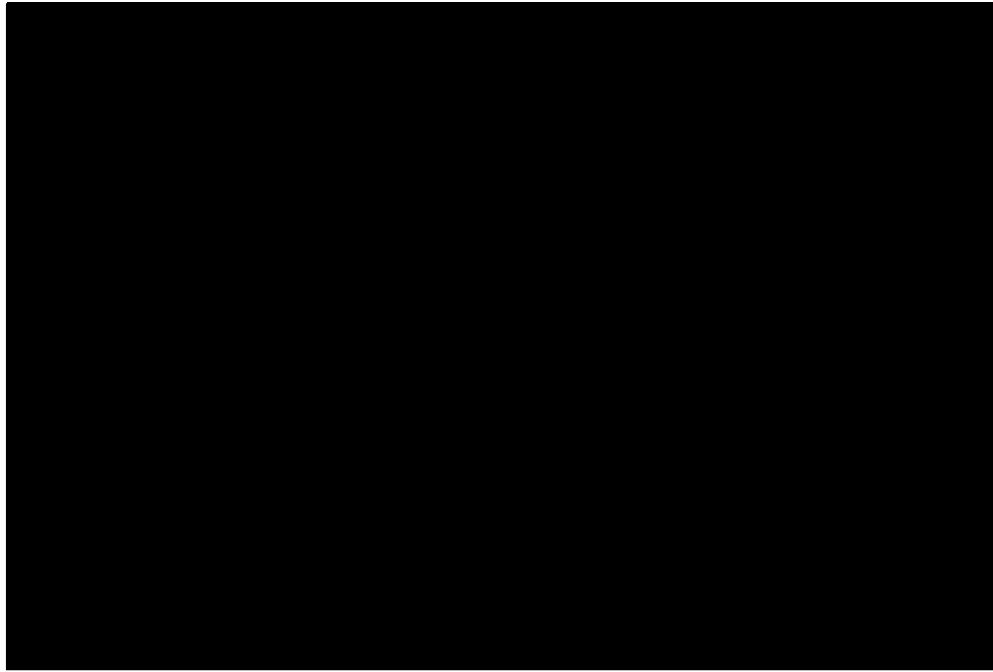
Purposes for buying the iPad



Purposes for buying the iPad

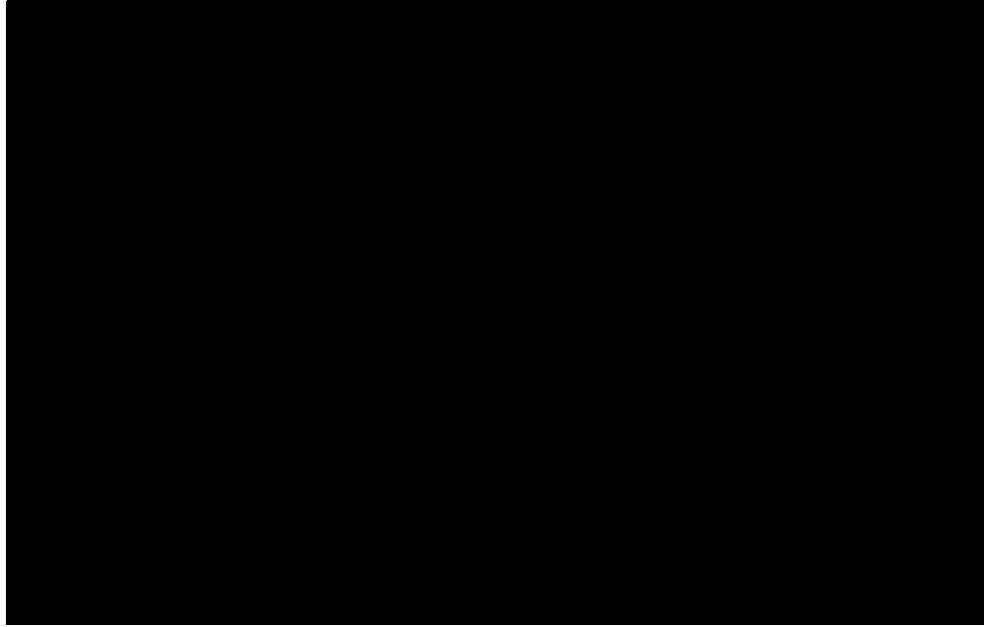


Purposes for buying the iPad

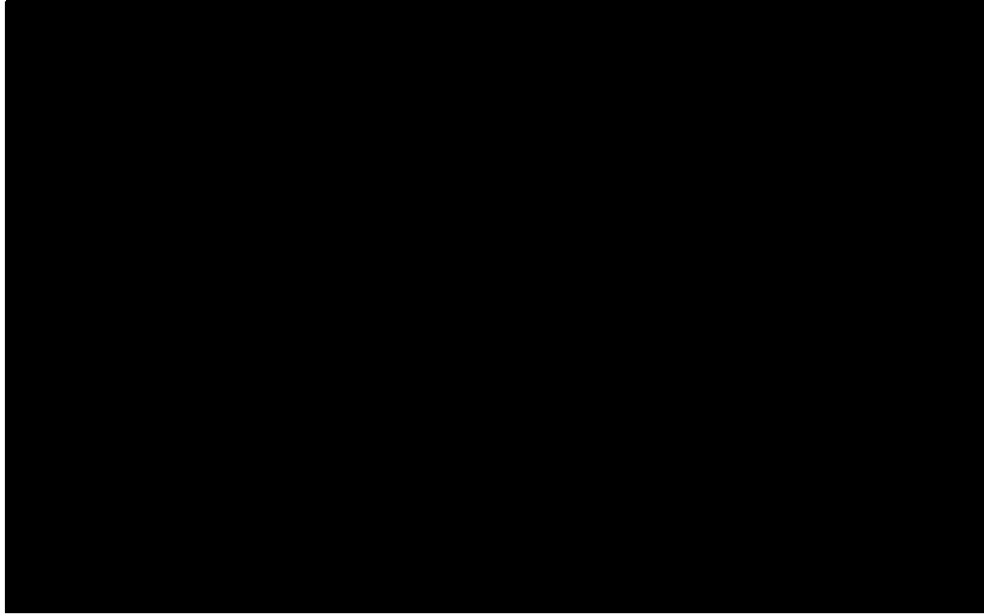


Purposes for buying the iPad

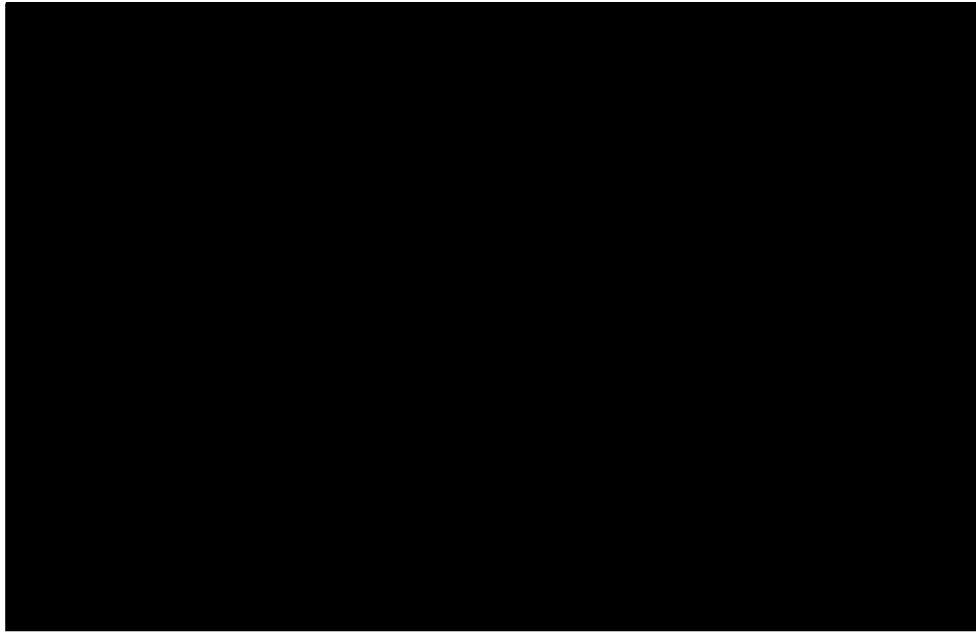
For work



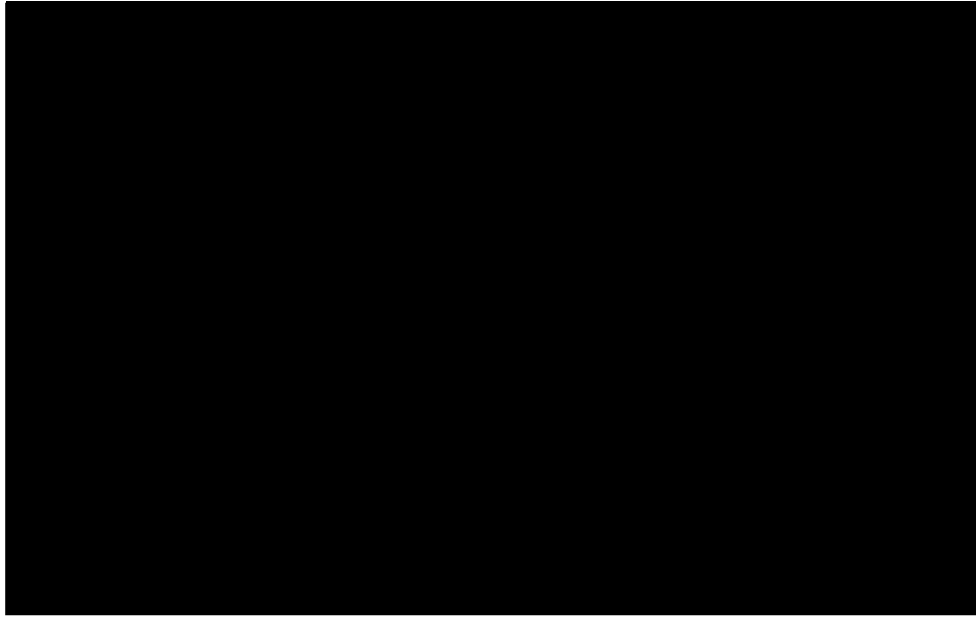
Planned activities



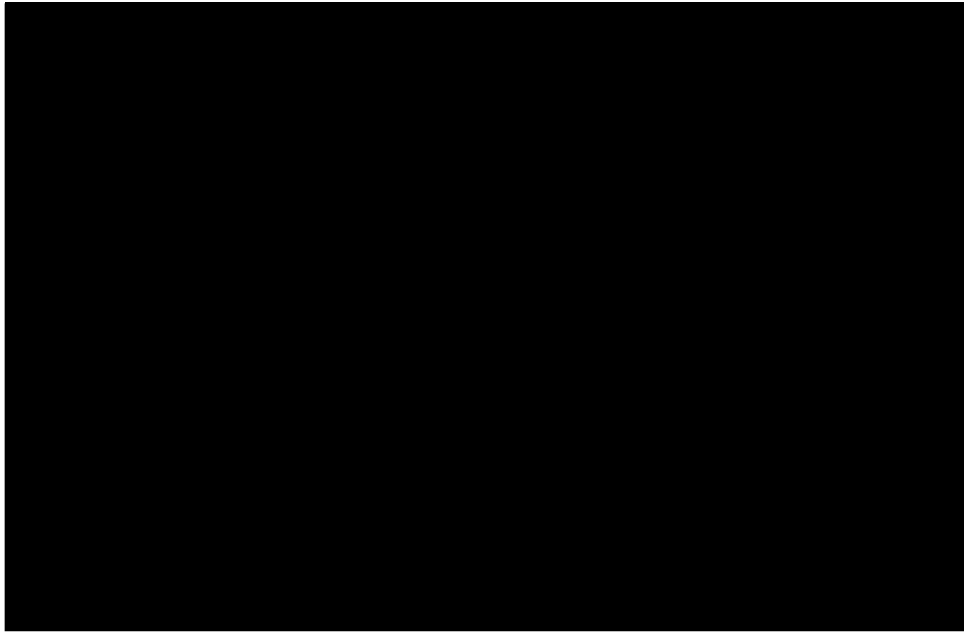
Planned activities



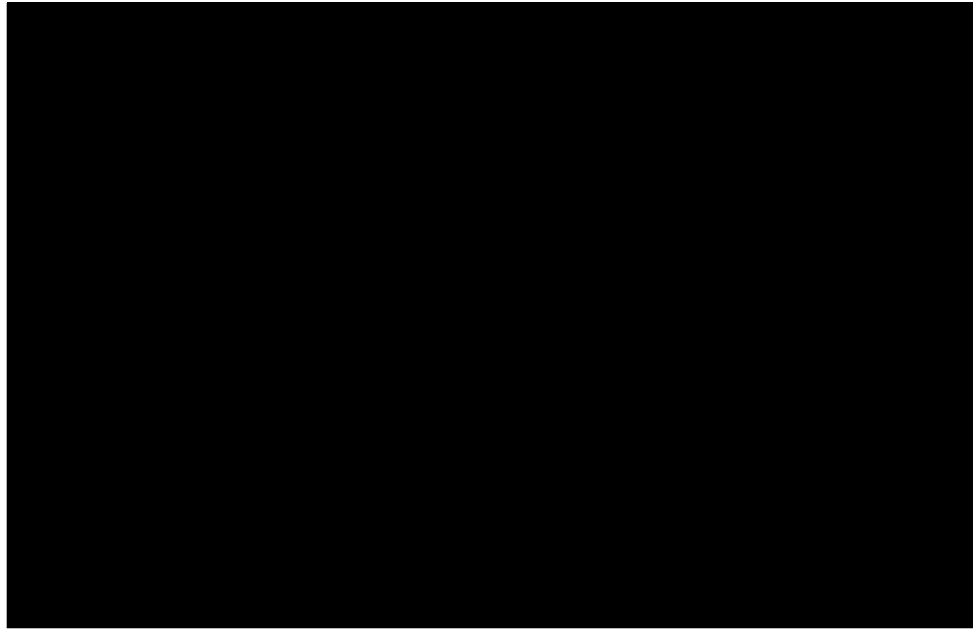
Planned activities



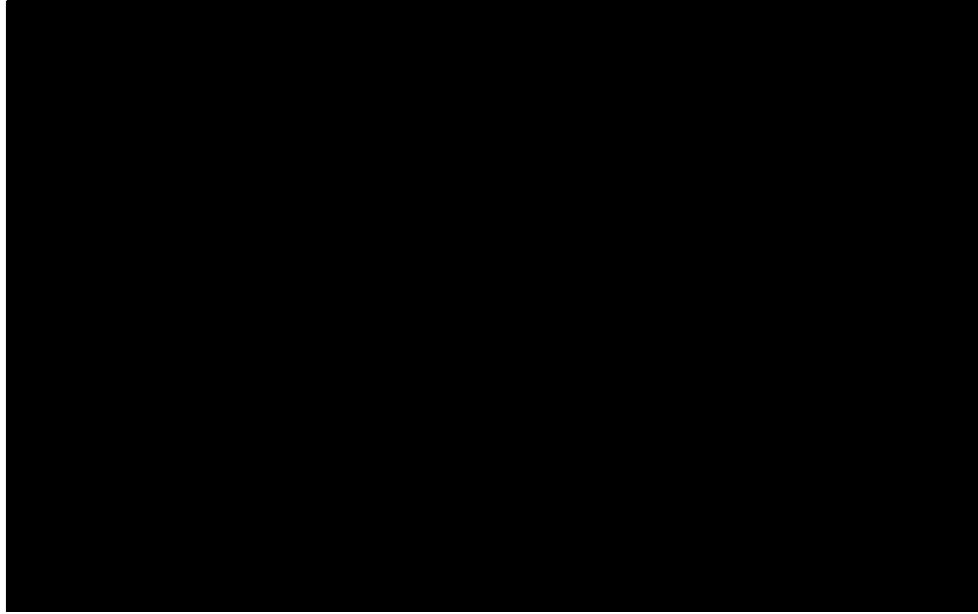
Planned activities



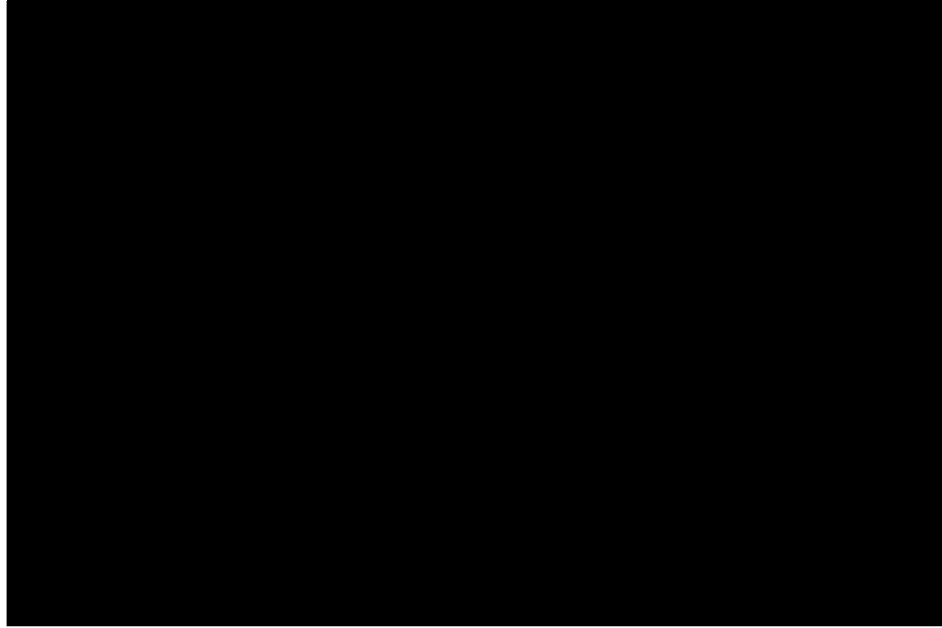
Planned activities



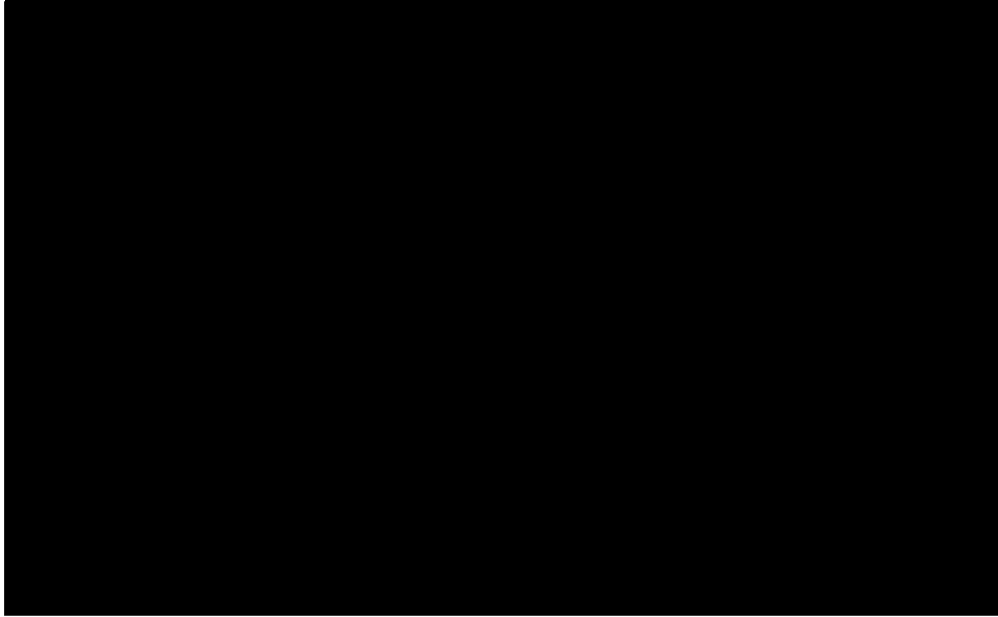
Planned activities



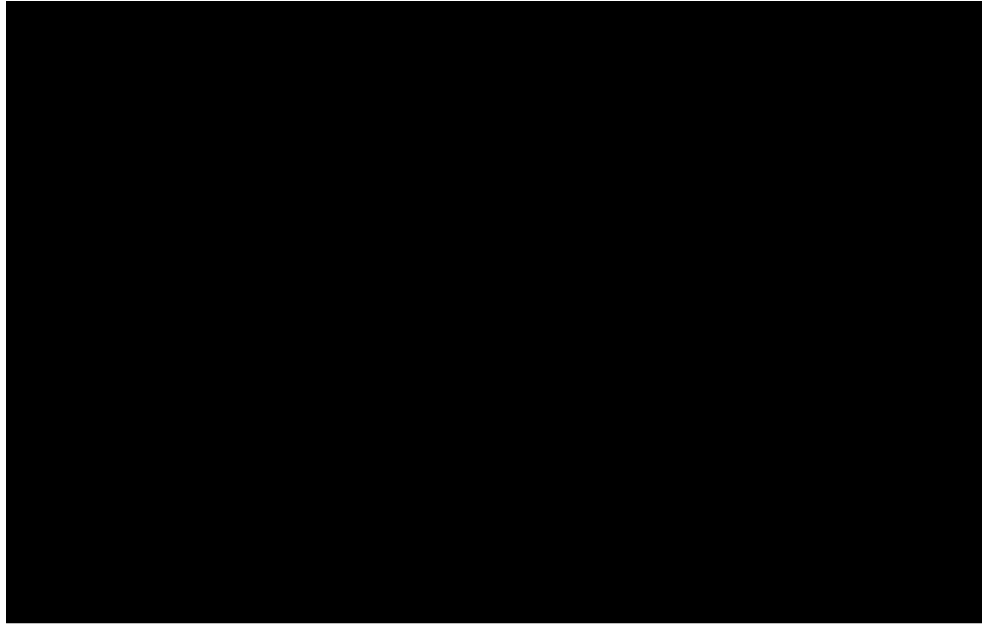
Planned activities



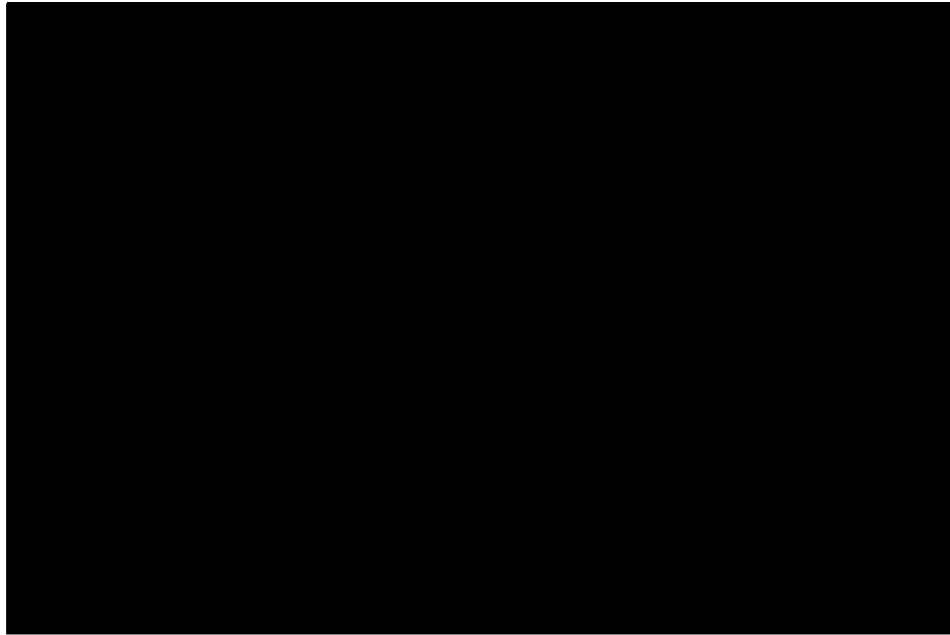
Planned activities



Planned activities



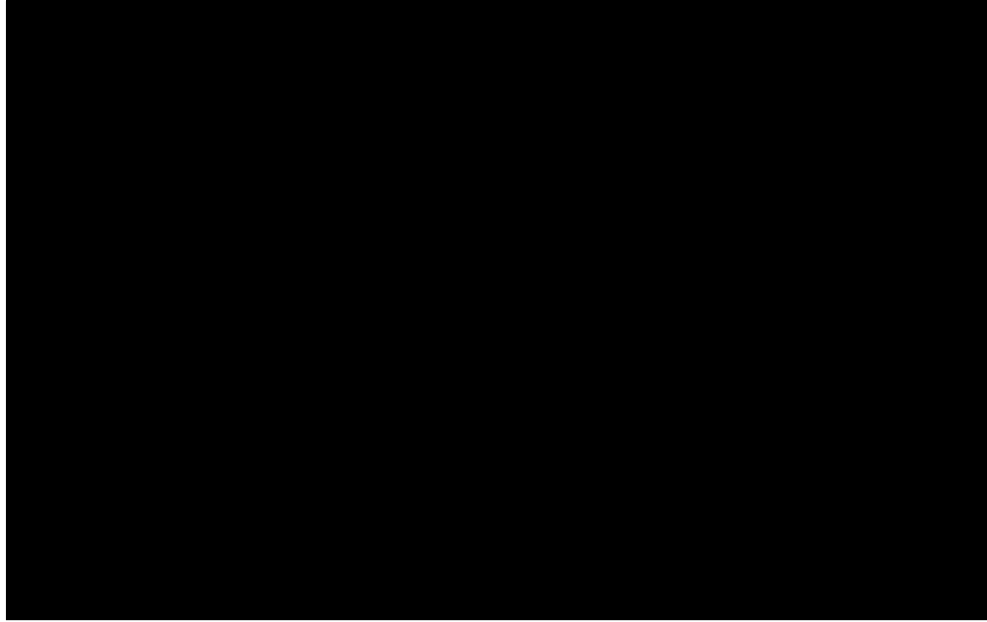
Planned activities



x

Consideration

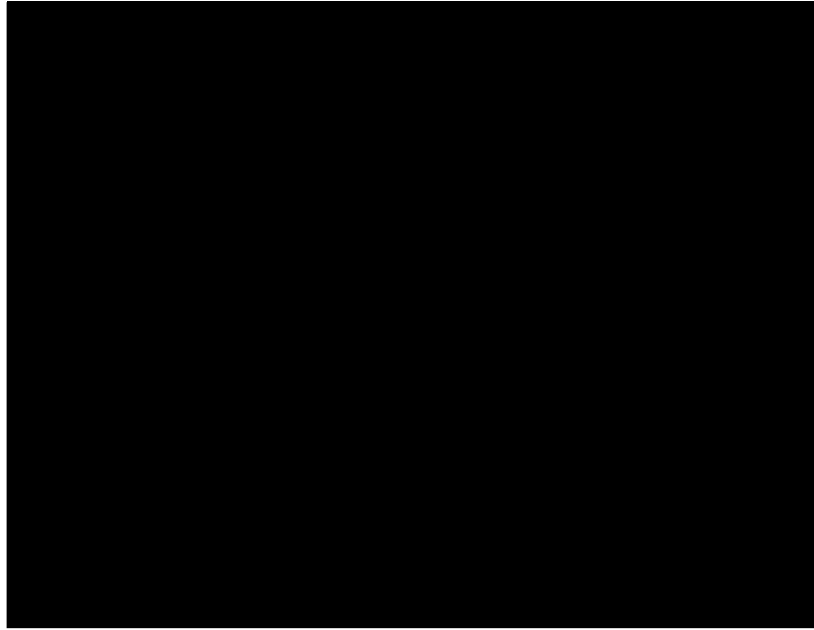
Considered other iPad models



Considered other iPad models

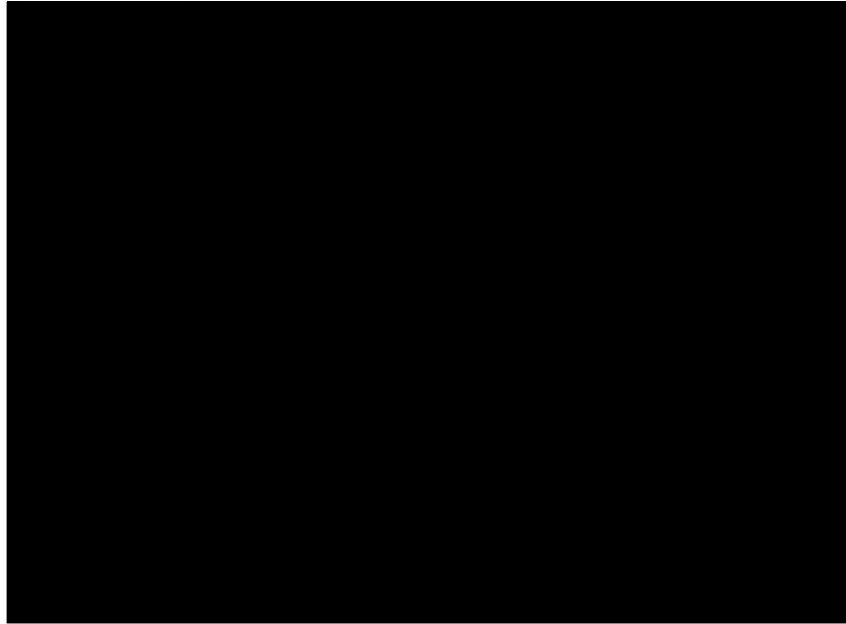


iPad models considered (among those who considered
other iPad models)



APPLE
CONFIDENTIAL X

iPad models considered (among those who considered
other iPad models)



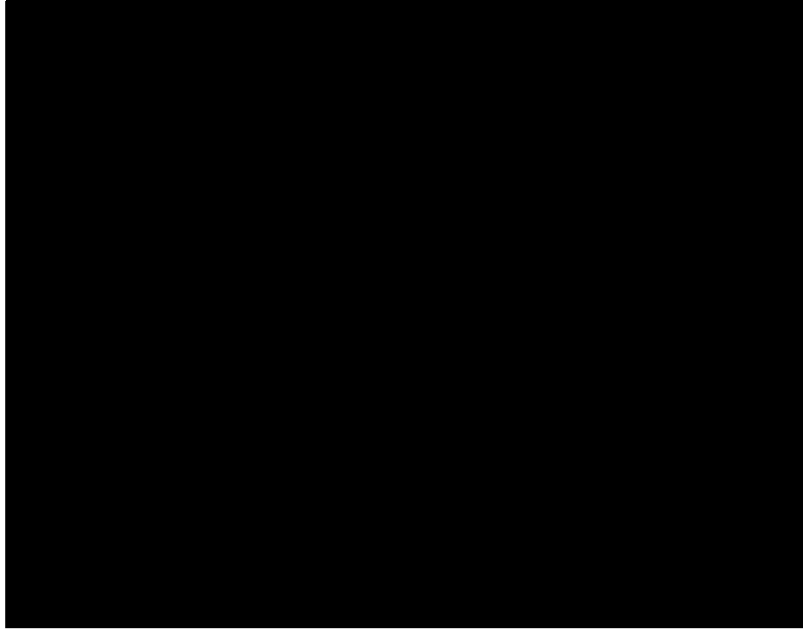
iPad models considered (among those who considered
other iPad models)



iPad models considered (among those who considered
other iPad models)

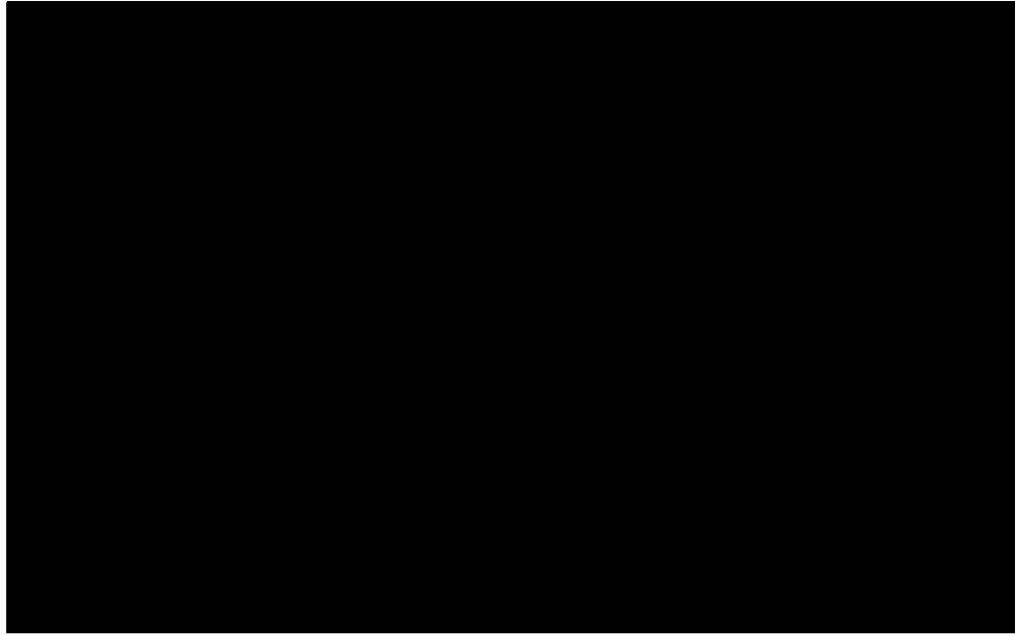


iPad models considered (among those who considered
other iPad models)

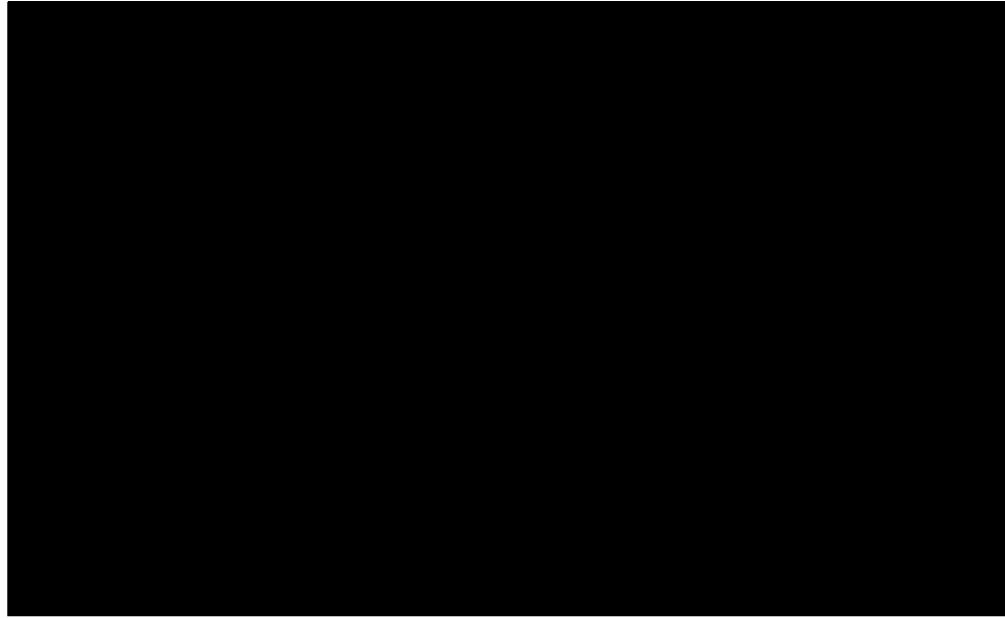


APPLE
CONFIDENTIAL X

Considered other tablet brands



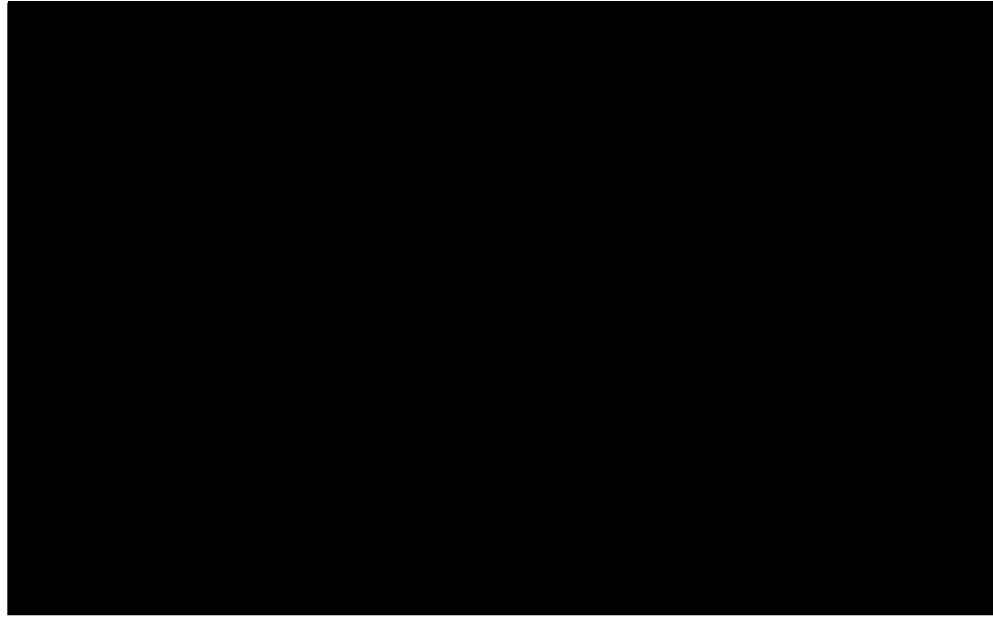
Considered other tablet brands



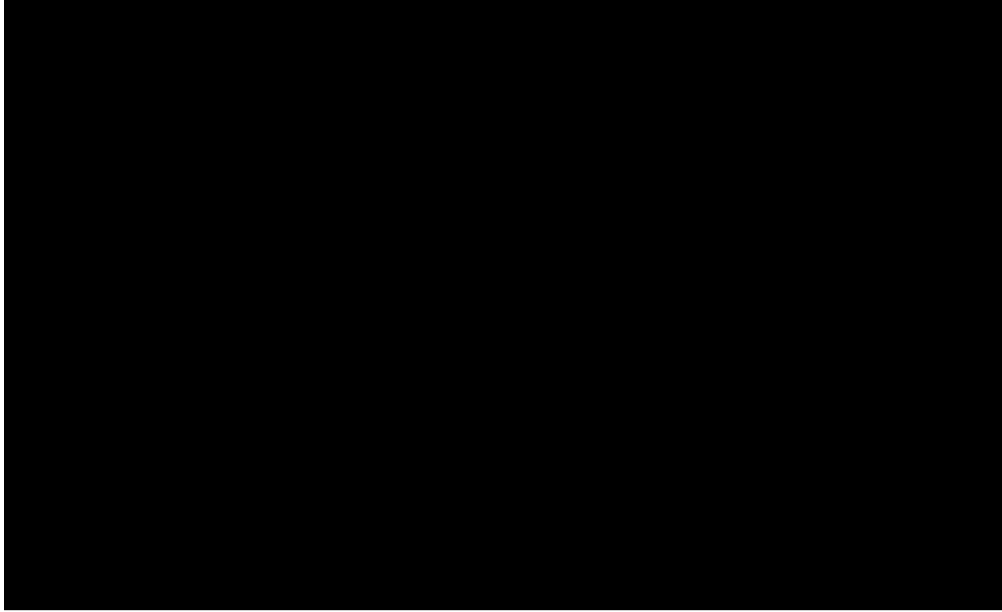
Competitor tablet brands considered (among those who considered other tablet brands)



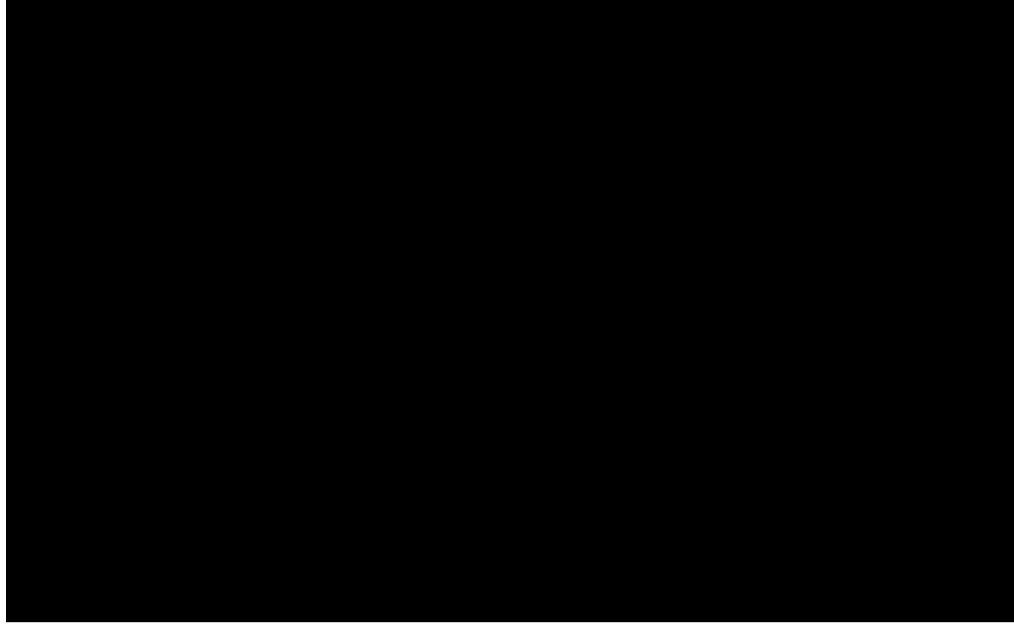
Competitor tablet brands considered (among those who considered other tablet brands)



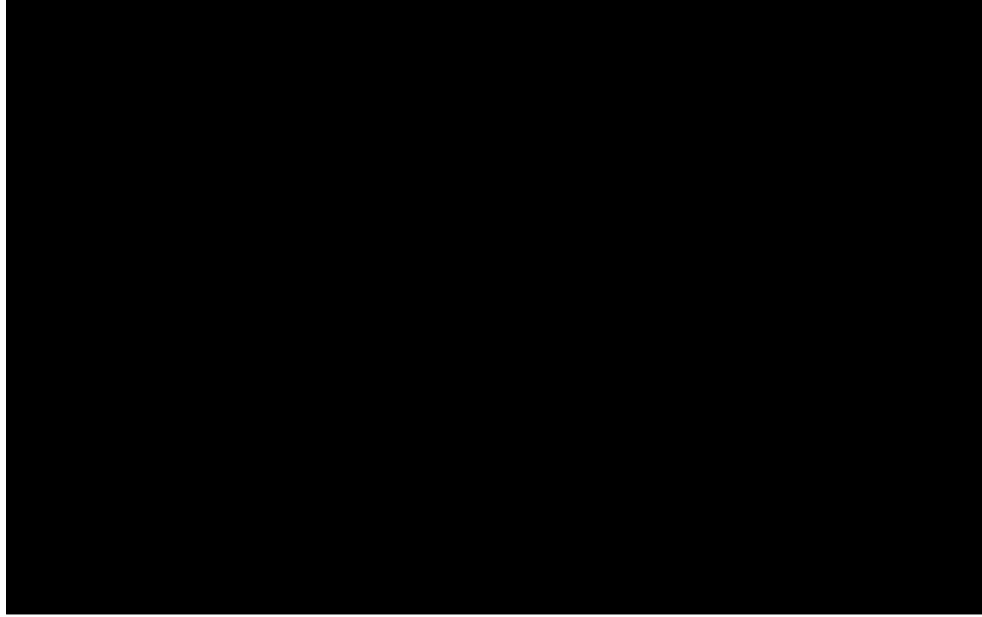
Considered other devices



Considered other devices



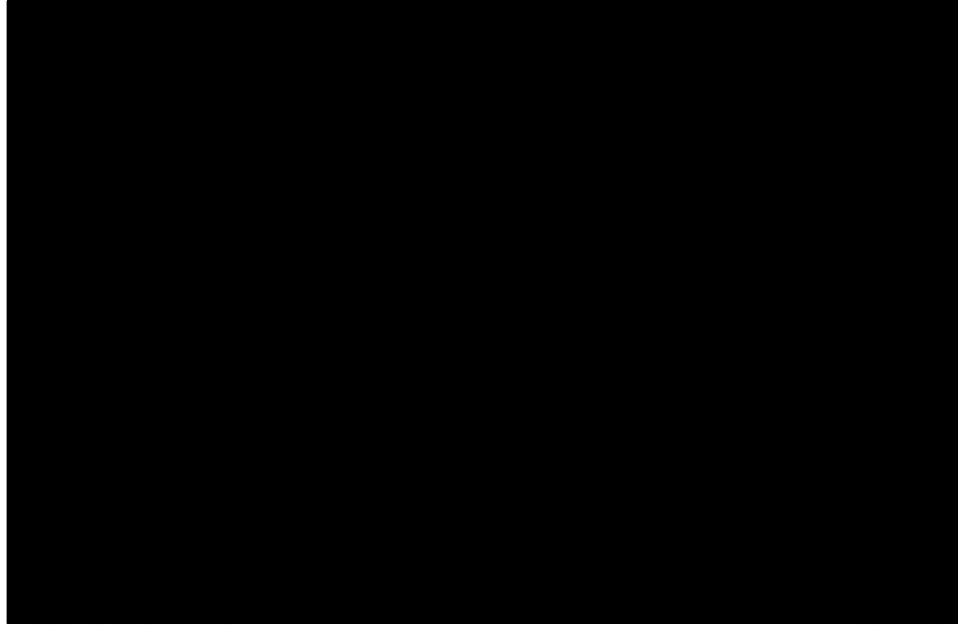
Other devices considered (among those who considered other devices)



Other devices considered (among those who considered
other devices)

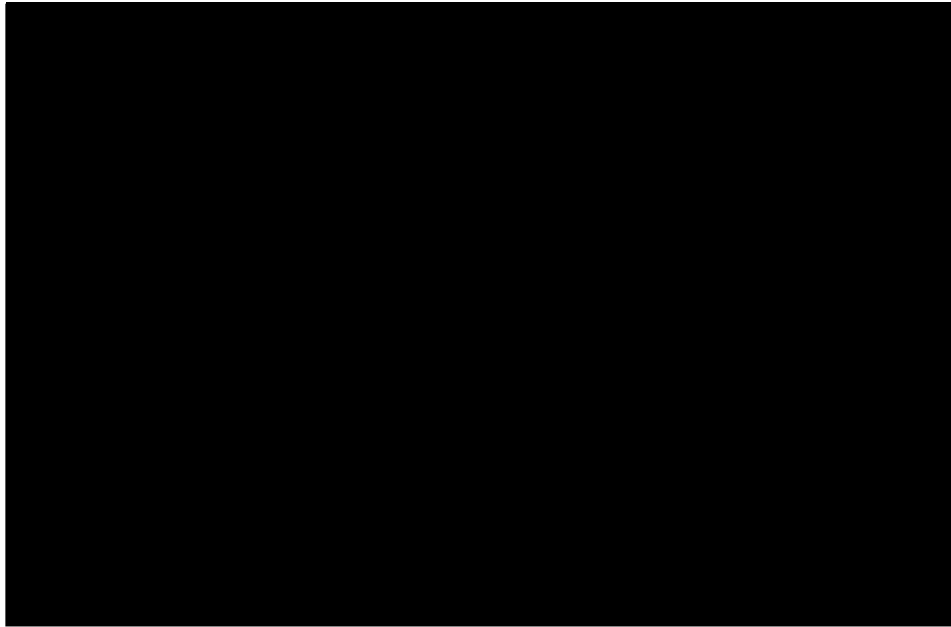


Reason for considering Windows laptop



87

Reason for considering 2-in-1 Windows laptop



x

Reason for considering Mac notebook



88

Reason for considering Mac notebook

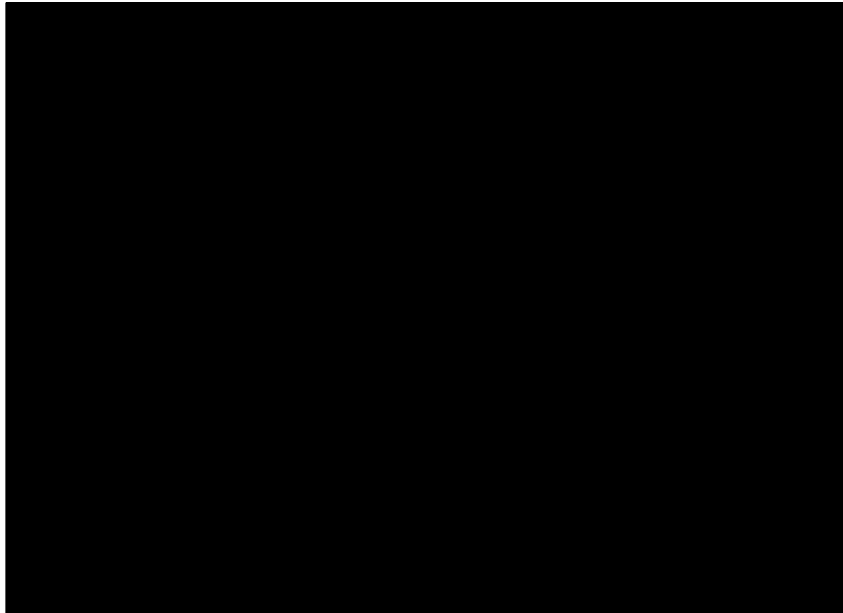


Reasons for purchase

Purchase drivers: overall

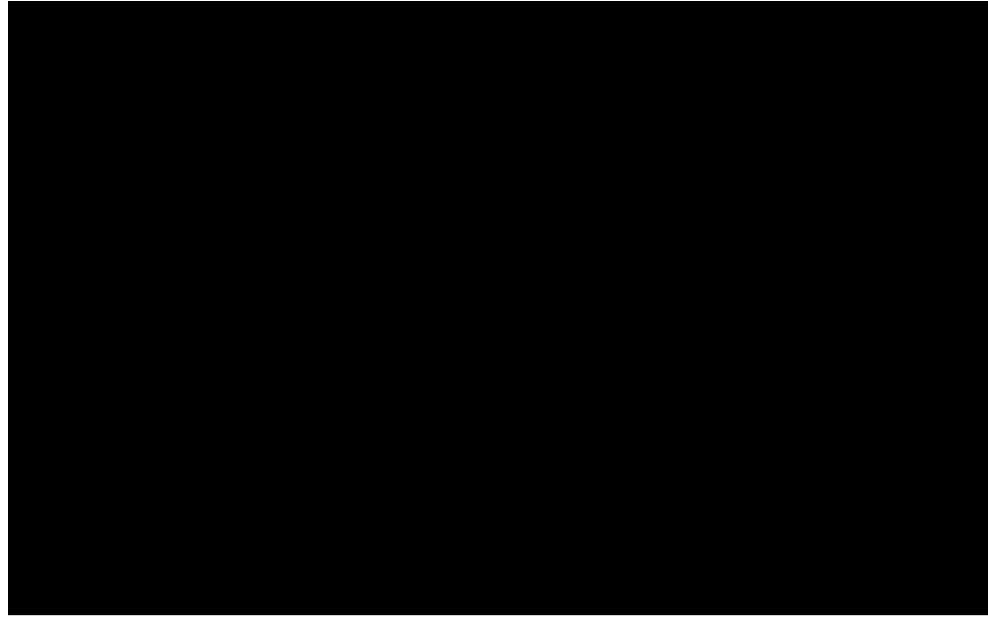
Important aspects in iPad purchase

Extremely important/Very important



Important aspects in iPad purchase

Extremely important/Very important



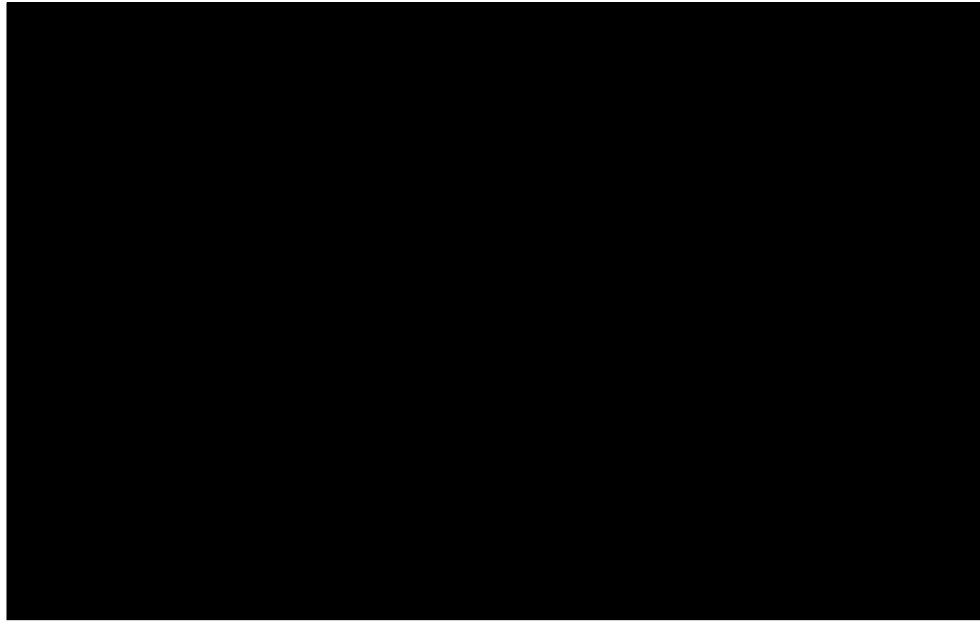
Important aspects in iPad purchase

Extremely important/Very important



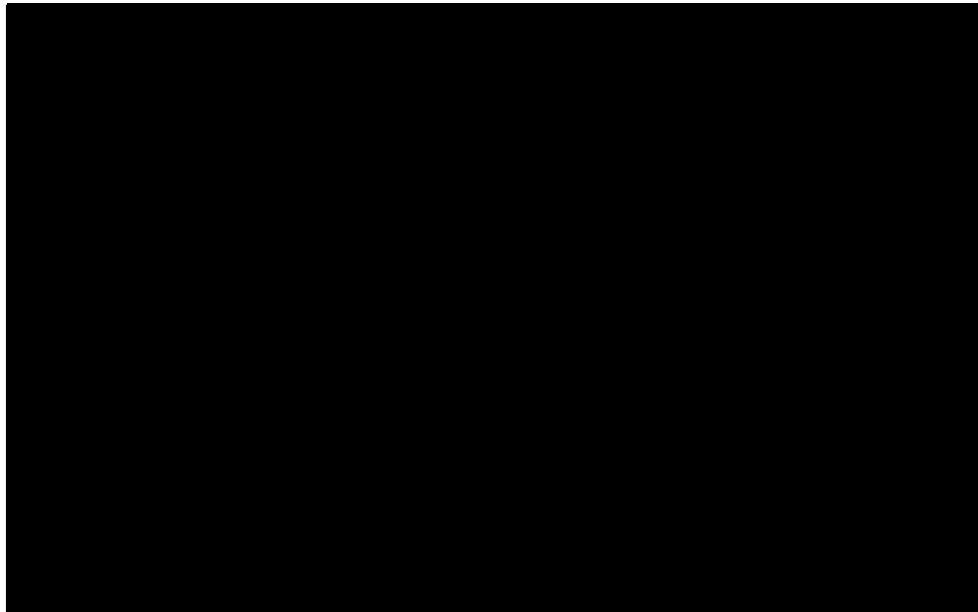
Important aspects in iPad purchase

Extremely important/Very important



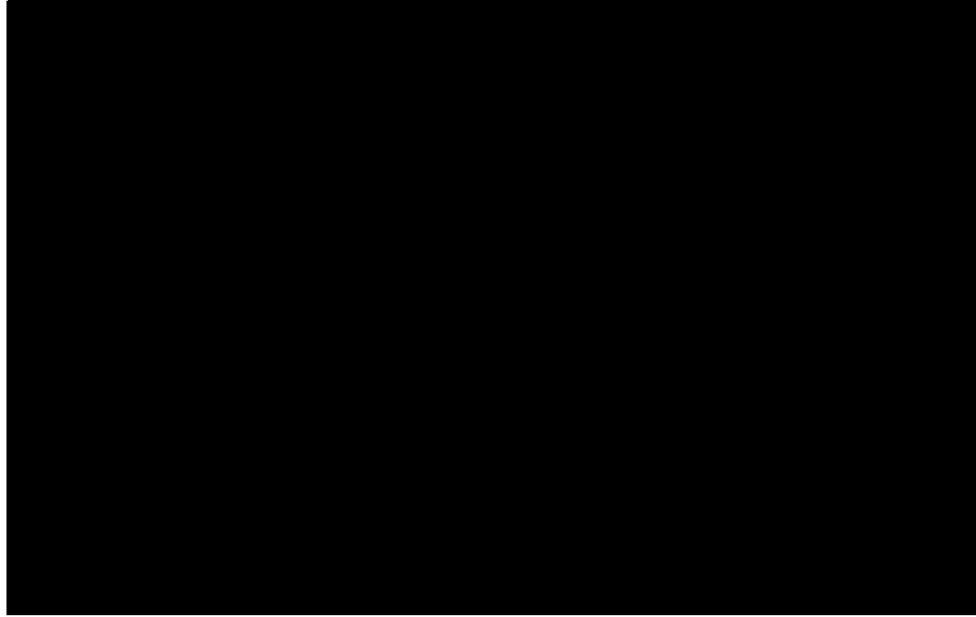
Important aspects in iPad purchase

Extremely important/Very important



Important aspects in iPad purchase

Extremely important



Important aspects in iPad purchase

Extremely important/Very important



Important aspects in iPad purchase

Extremely important/Very important



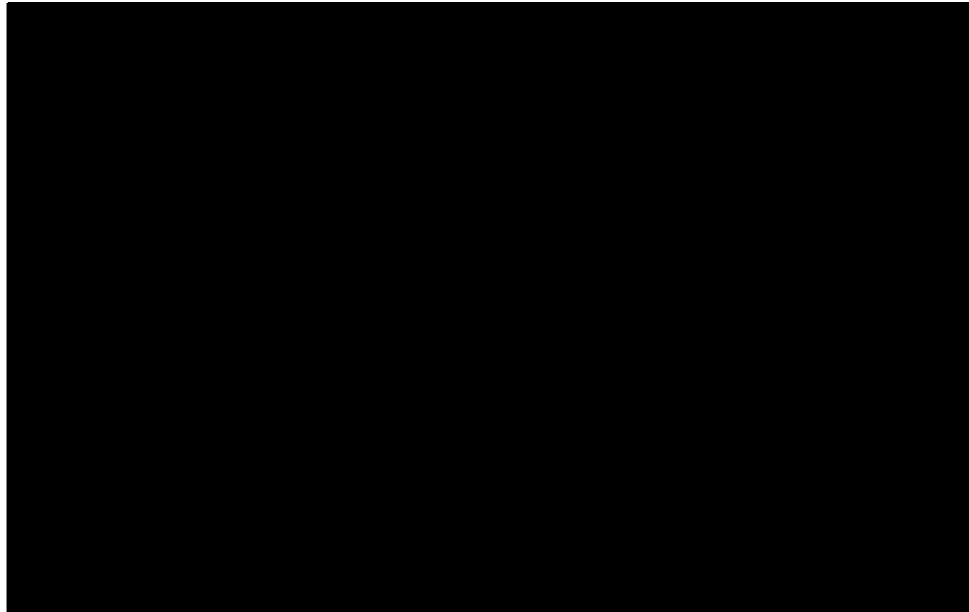
Important aspects in iPad purchase

Extremely important/Very important



Important aspects in iPad purchase

Extremely important/Very important



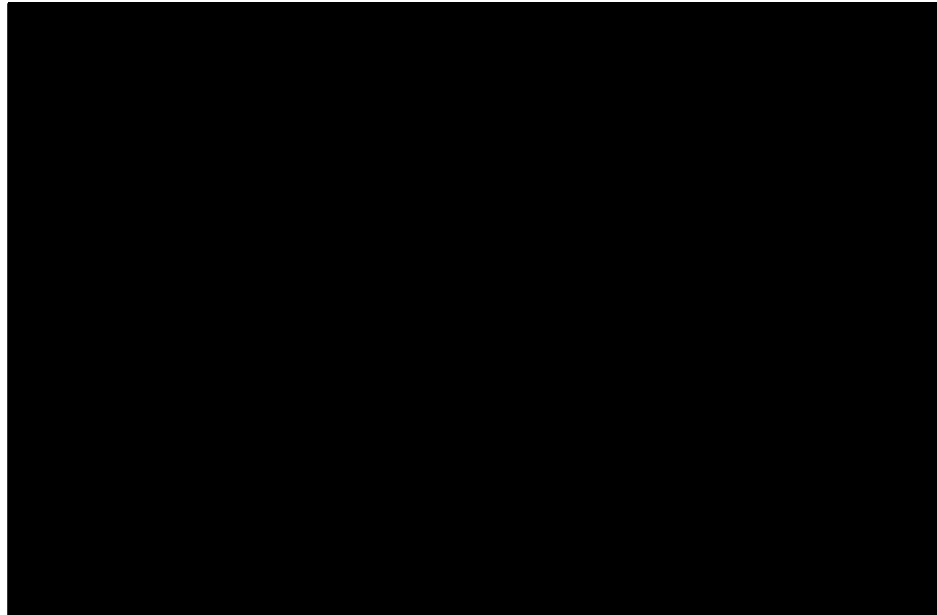
Important aspects in iPad purchase

Extremely important/Very important



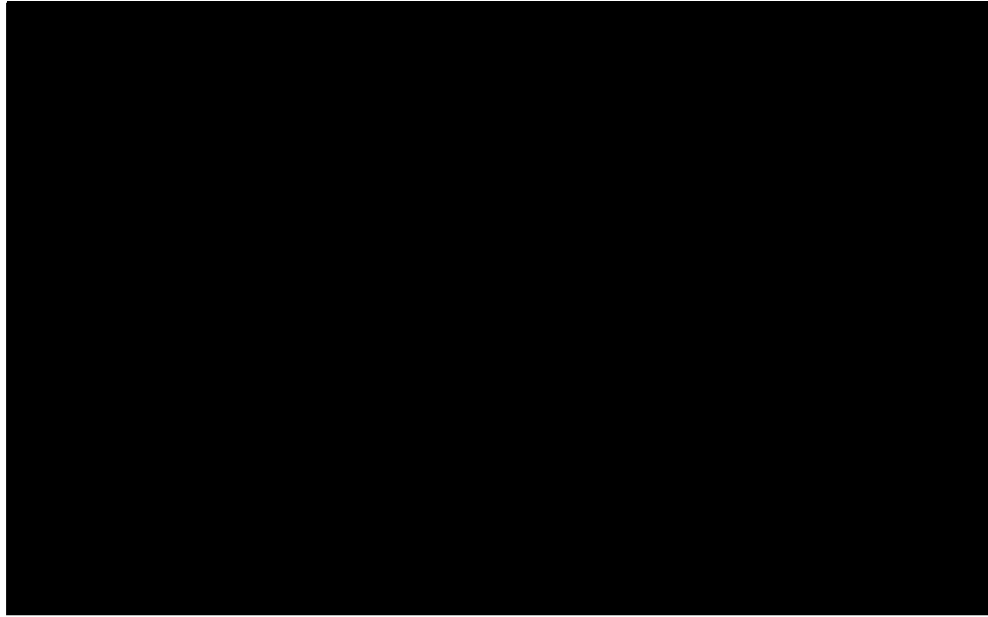
Important aspects in iPad purchase

Extremely important



x

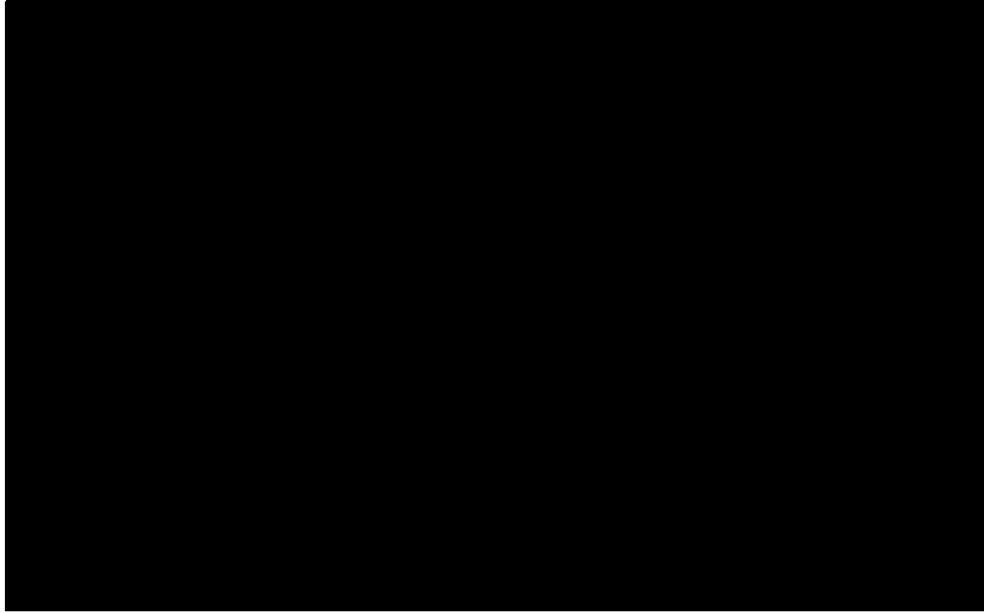
Types of AR apps most interested in



Purchase drivers: ranking

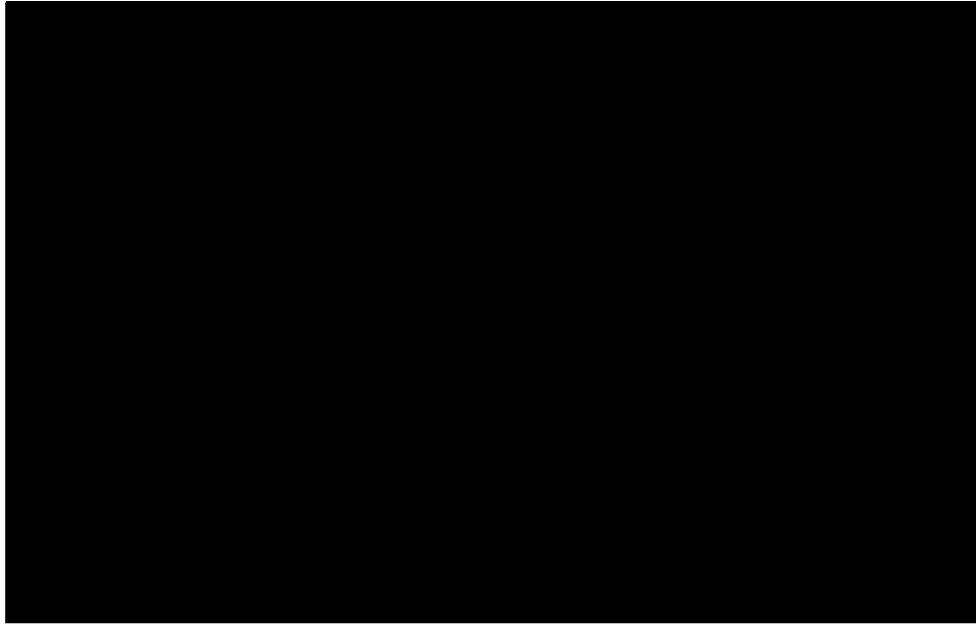
Order of importance of attributes in purchase decision

Rank 1/Rank 2/Rank 3



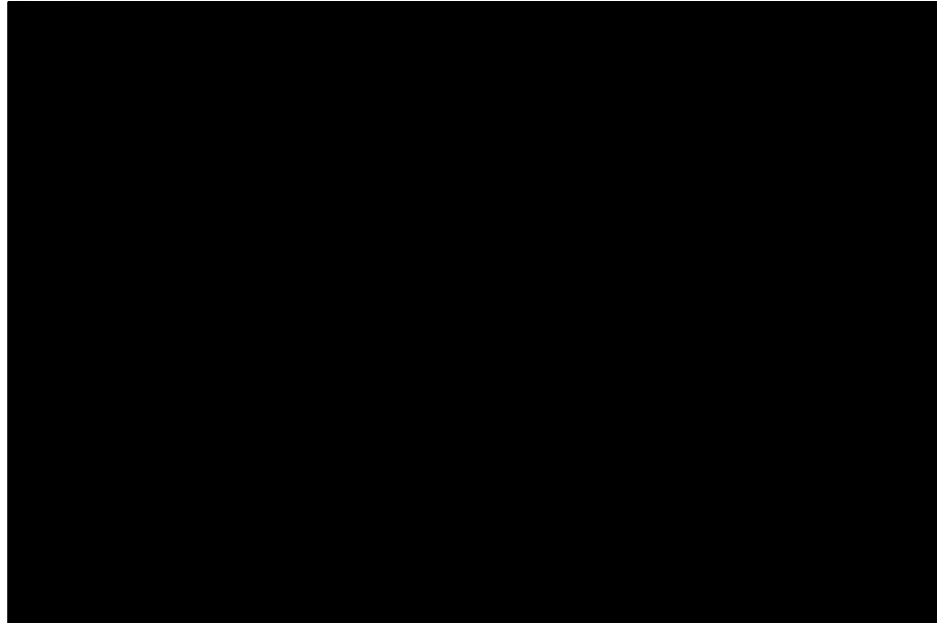
Order of importance of attributes in purchase decision

Rank 1/Rank 2/Rank 3



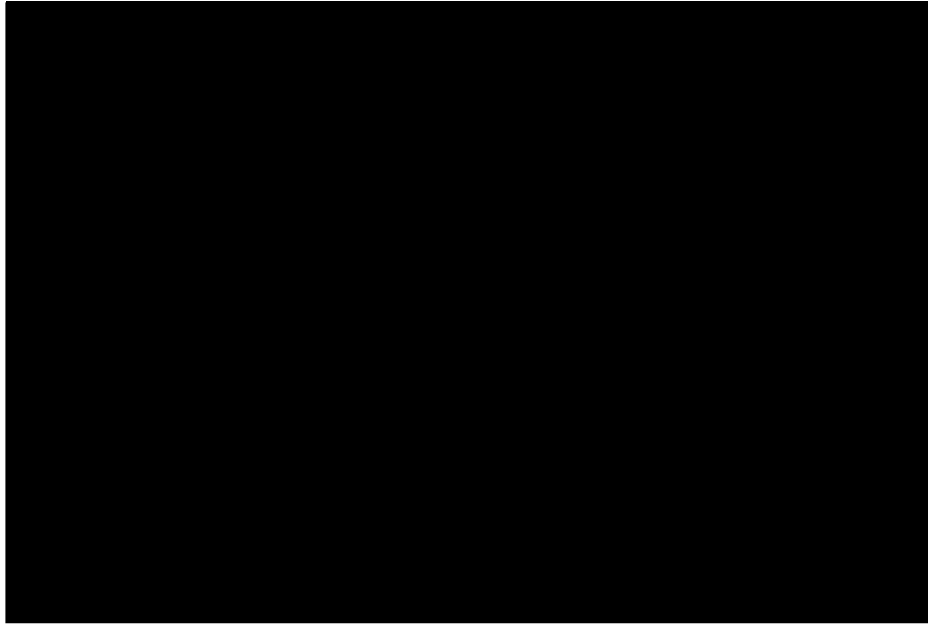
Order of importance of attributes in purchase decision

Rank 1/Rank 2/Rank 3



Order of importance of attributes in purchase decision

Rank 1/Rank 2/Rank 3



100

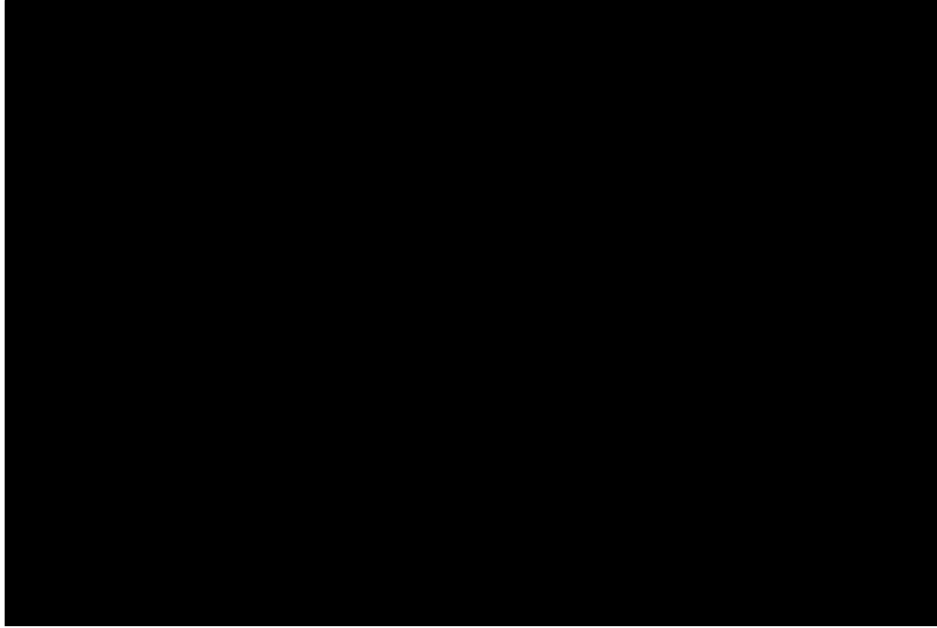
Purchase drivers: models

New features most influential in purchase decision

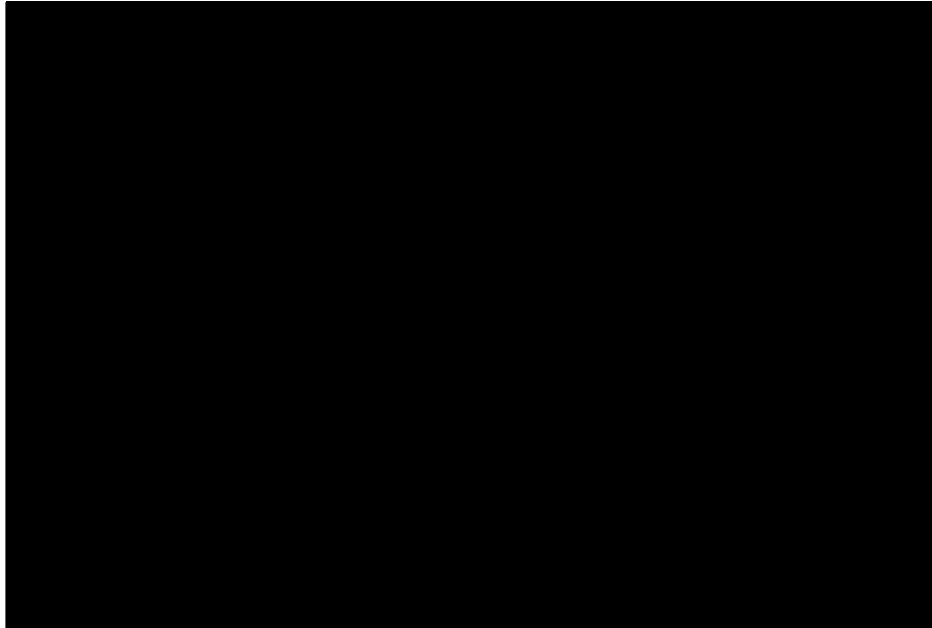


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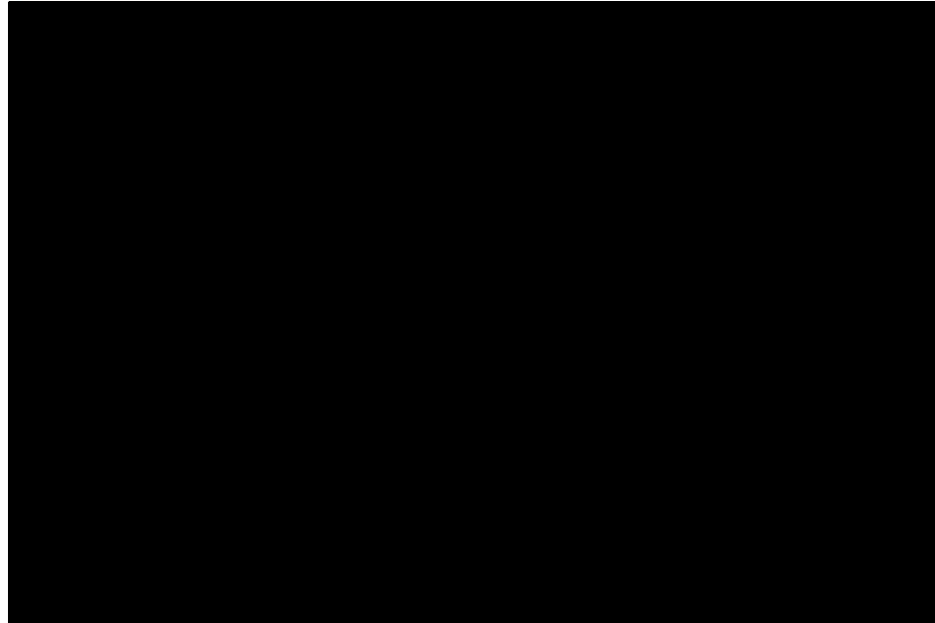
Reason for choosing 10.5" iPad Pro over iPad (6th generation)



Reason for choosing 2018 iPad Pro over the iPad (6th generation)

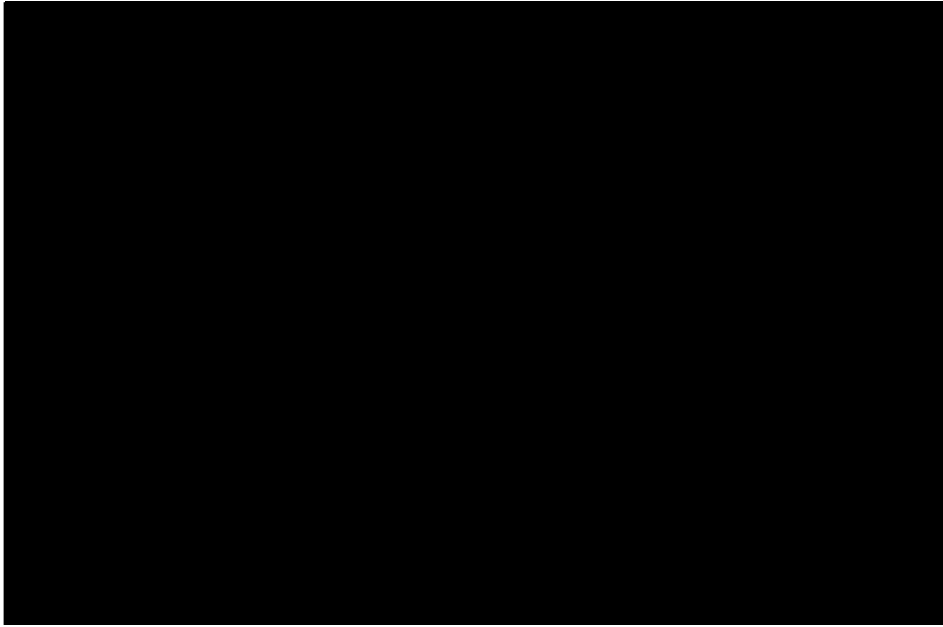


Reason for choosing 2018 iPad Pro over the iPad (6th generation)



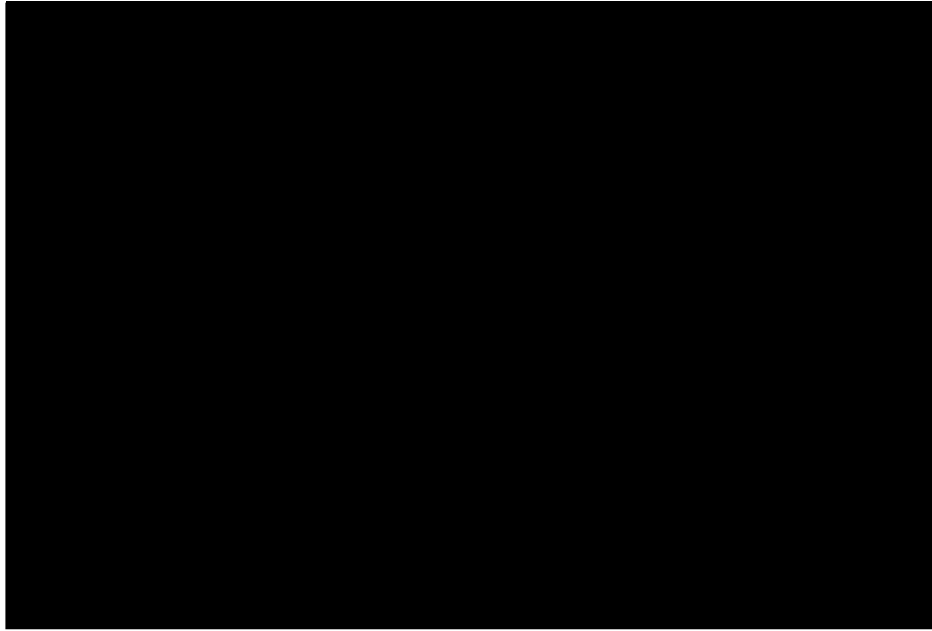
x

Reason for choosing 2018 iPad Pro over the iPad (6th generation)



x

Reason for choosing the iPad (6th generation) over the iPad Pro



Setup incl. Face ID

Typical Unlocking Method



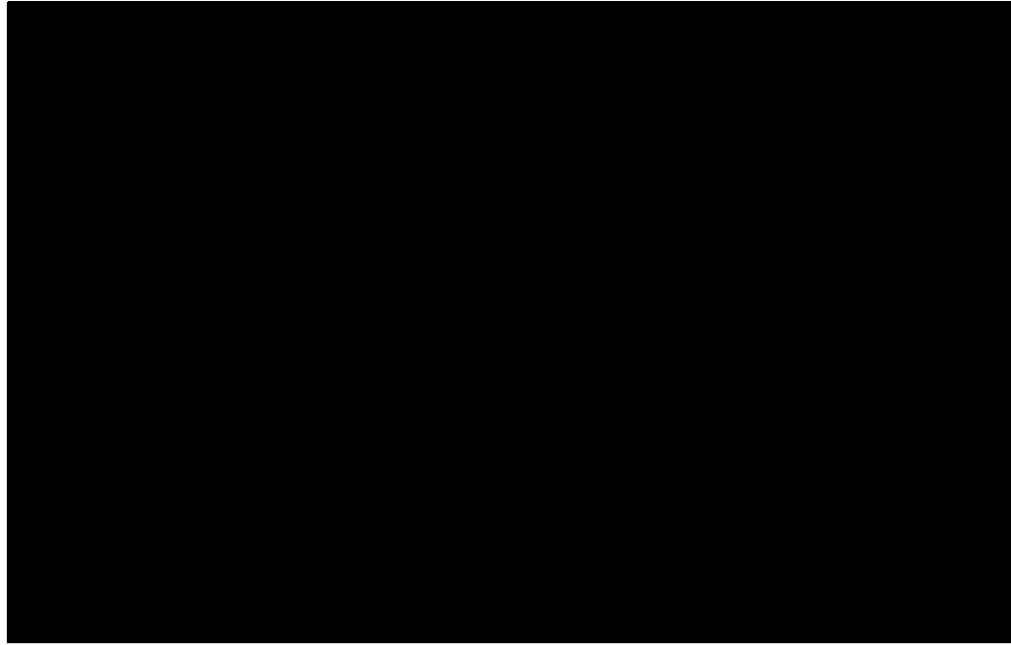
Typical Unlocking Method



Typical Unlocking Method



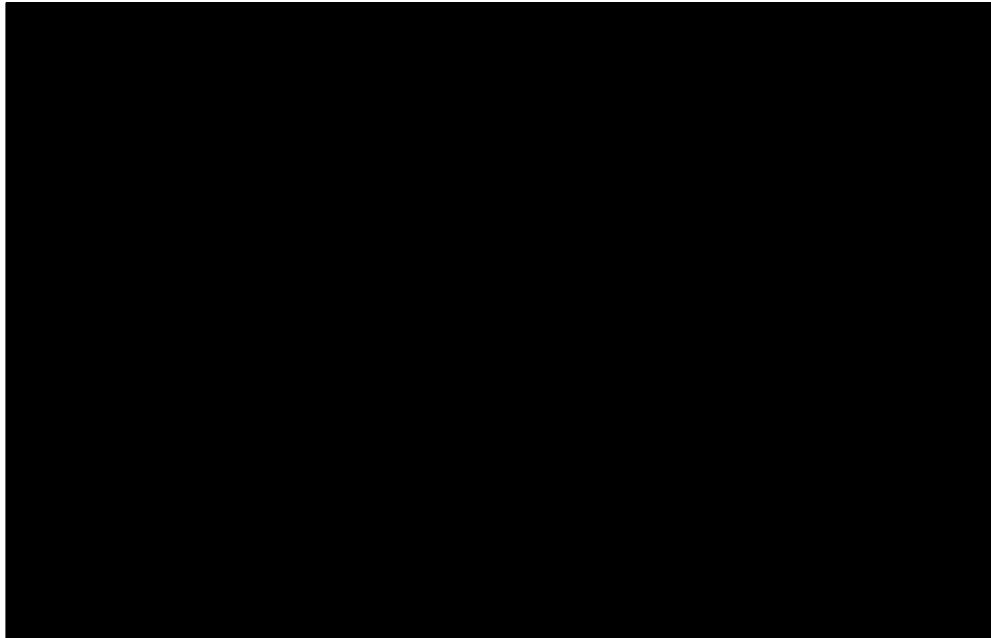
Typical Unlocking Method



Reason for unlocking iPad using a passcode, instead of
Face ID



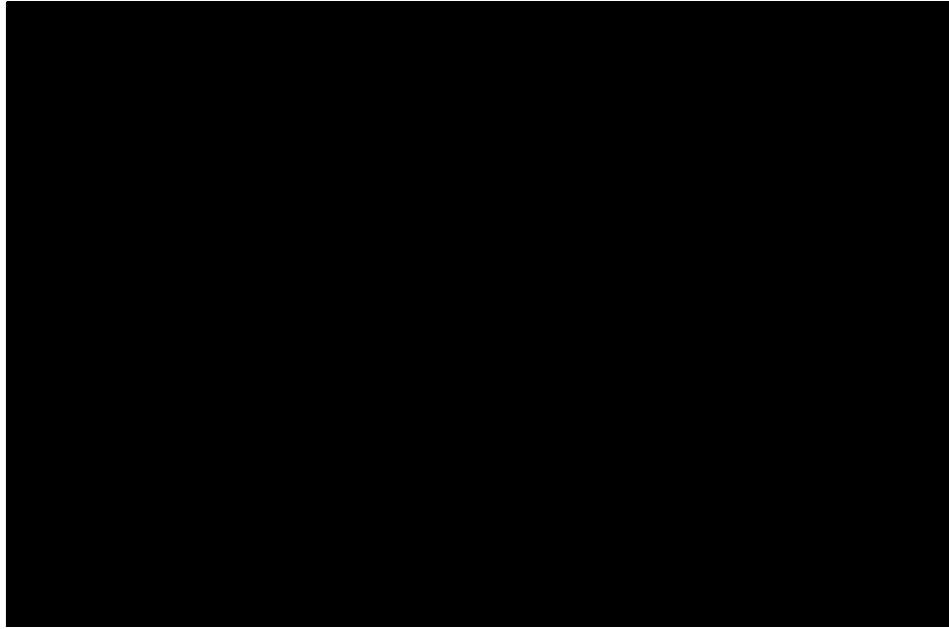
Overall Satisfaction with Face ID for unlocking



Reasons for dissatisfaction with Face ID for unlocking



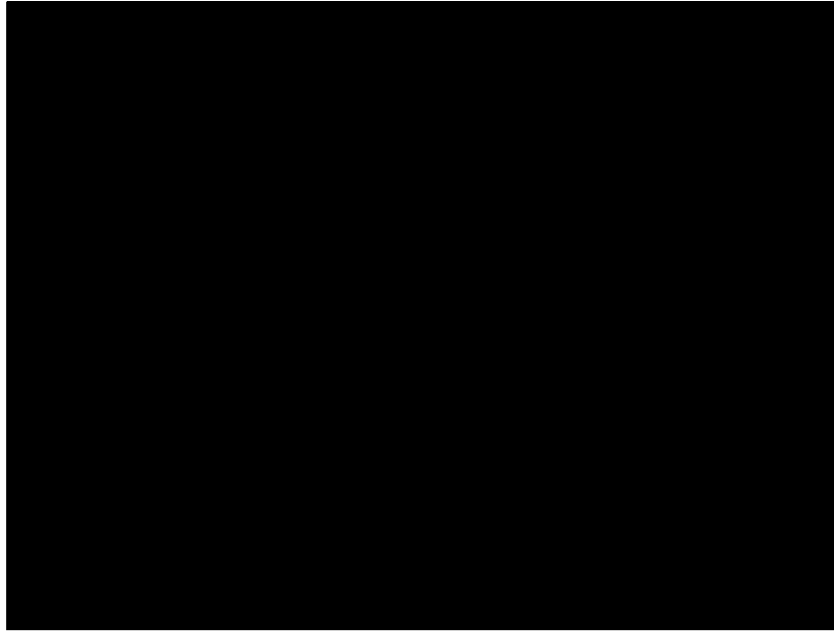
Types of Situations had issues with Face ID



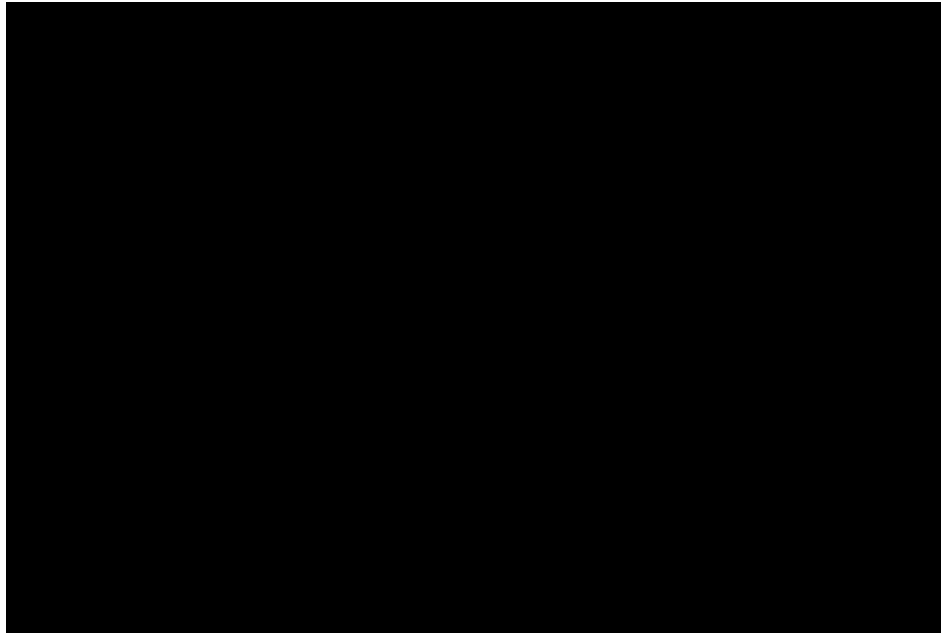
12

Initial Usage

Who else uses iPad

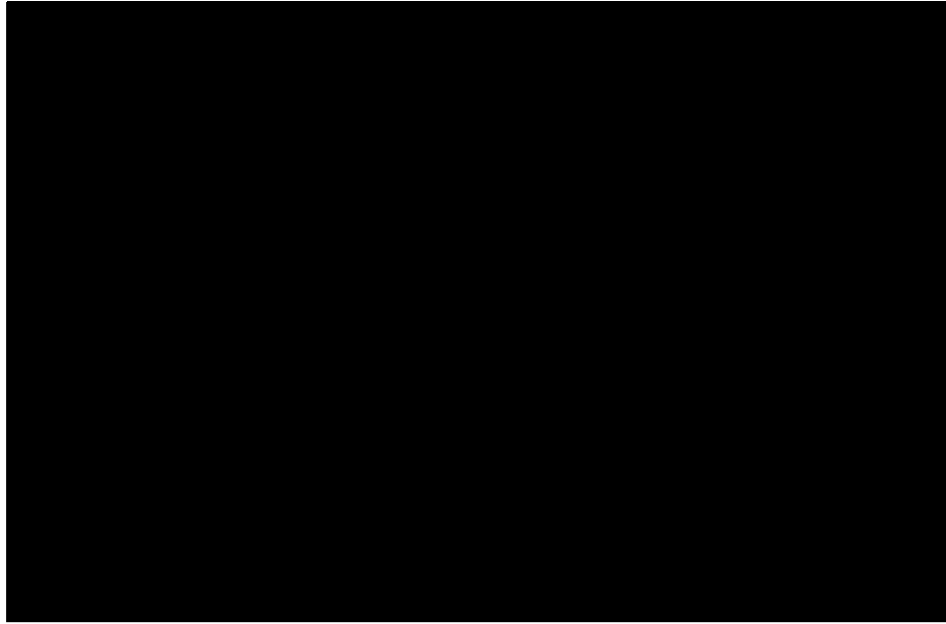


Who else uses iPad



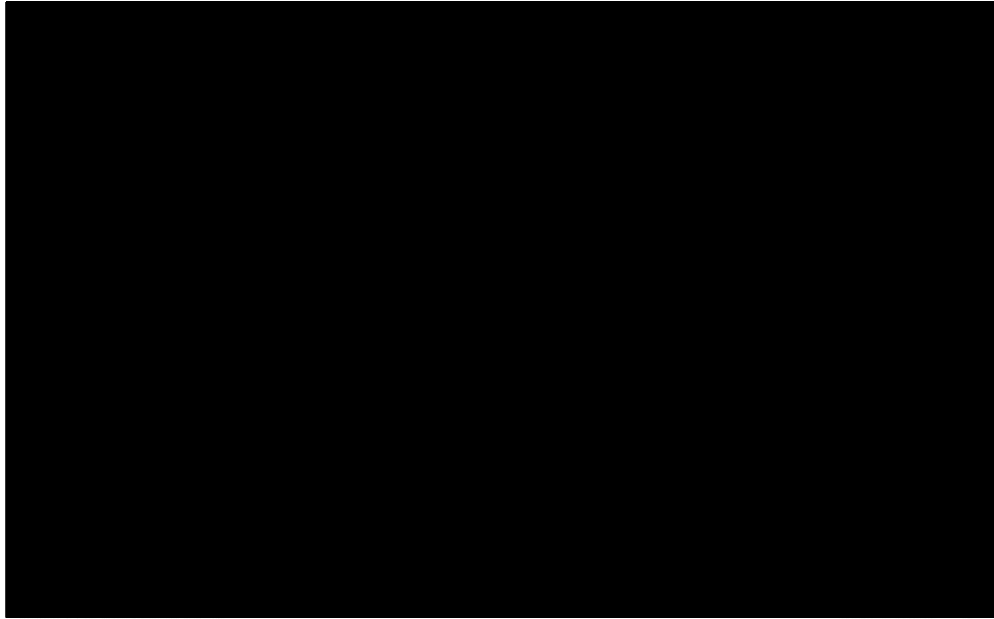
115

Awareness of features and services for the iPad

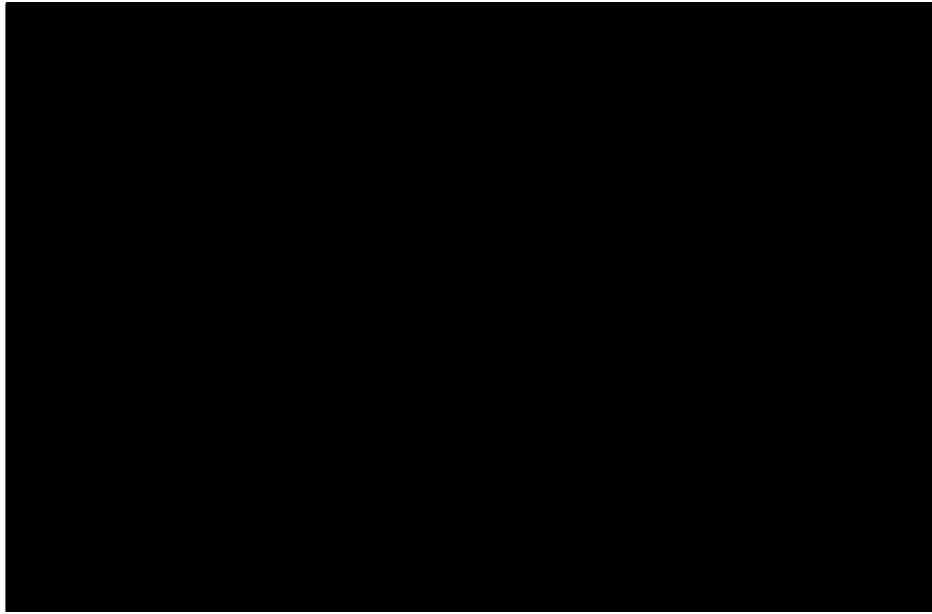


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Awareness of features and services for the iPad

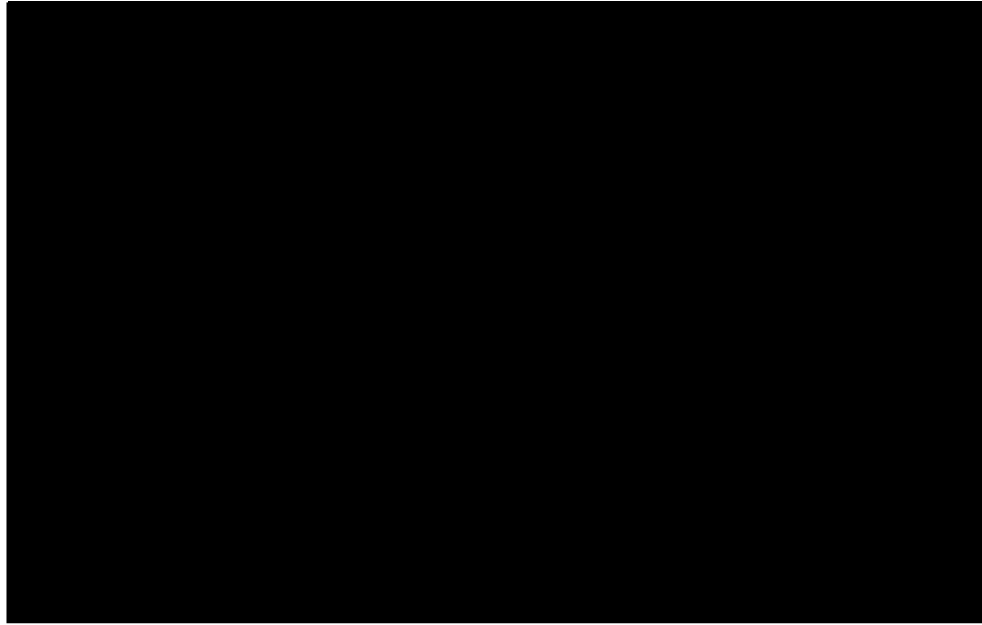


Features and services used on the iPad



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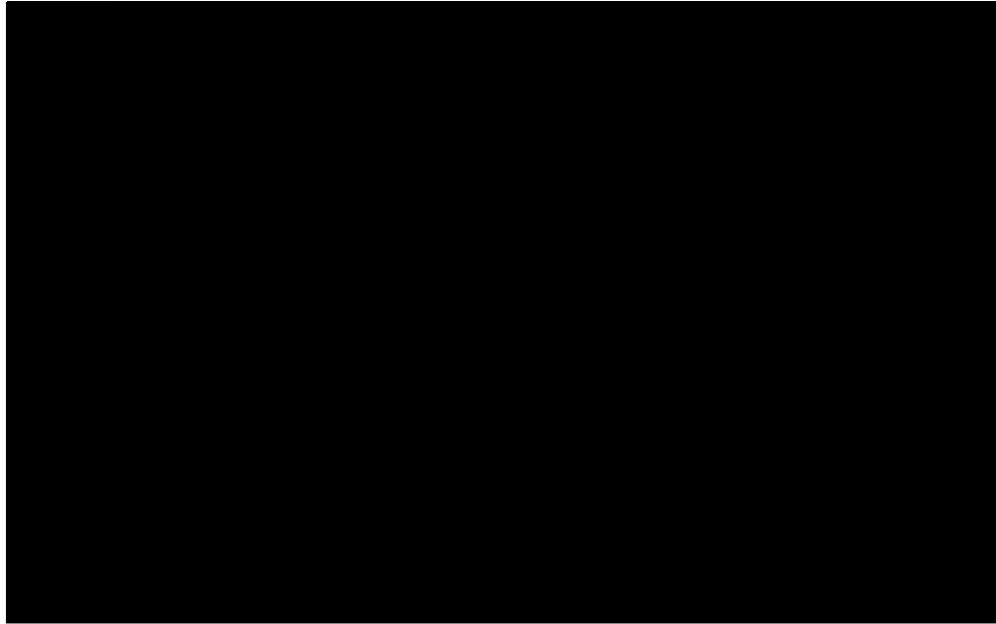
Features and services used on the iPad



Future Usage

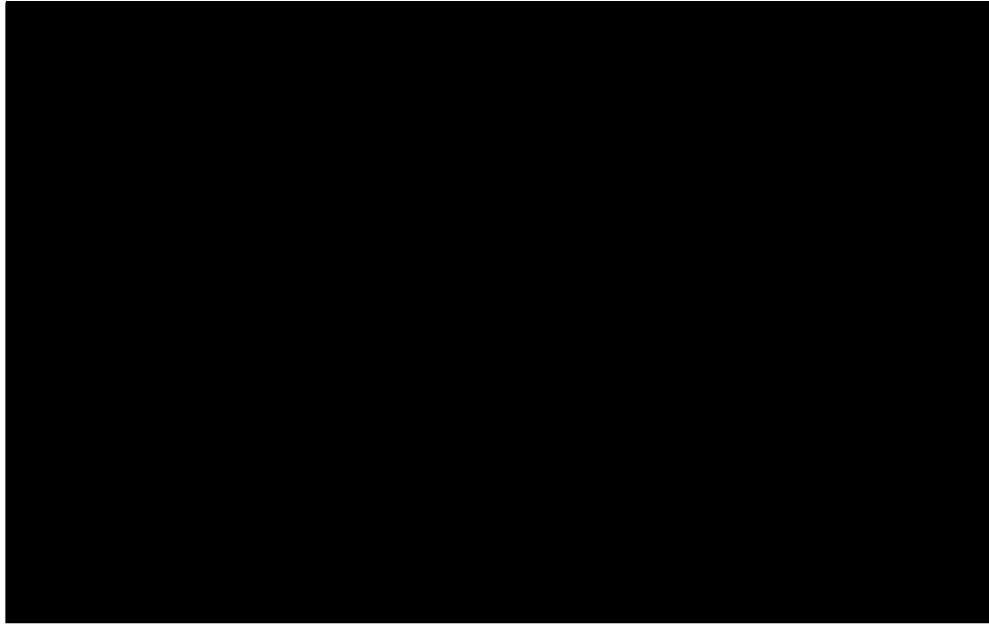
Expected change in device usage due to new iPad

Will use the device as much as I do today



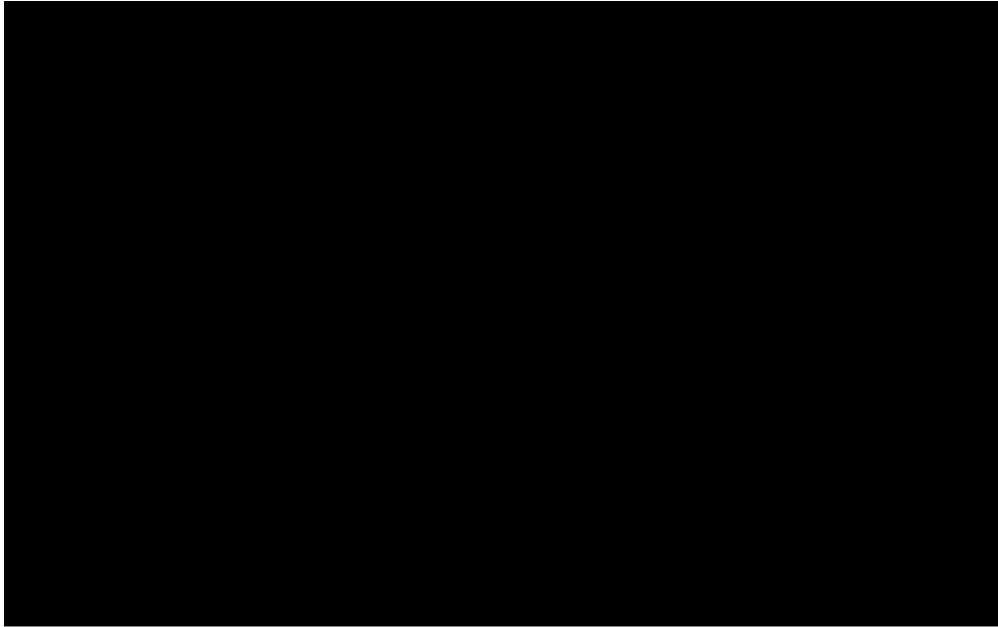
Expected change in device usage due to new iPad

Will use the device more than I do today



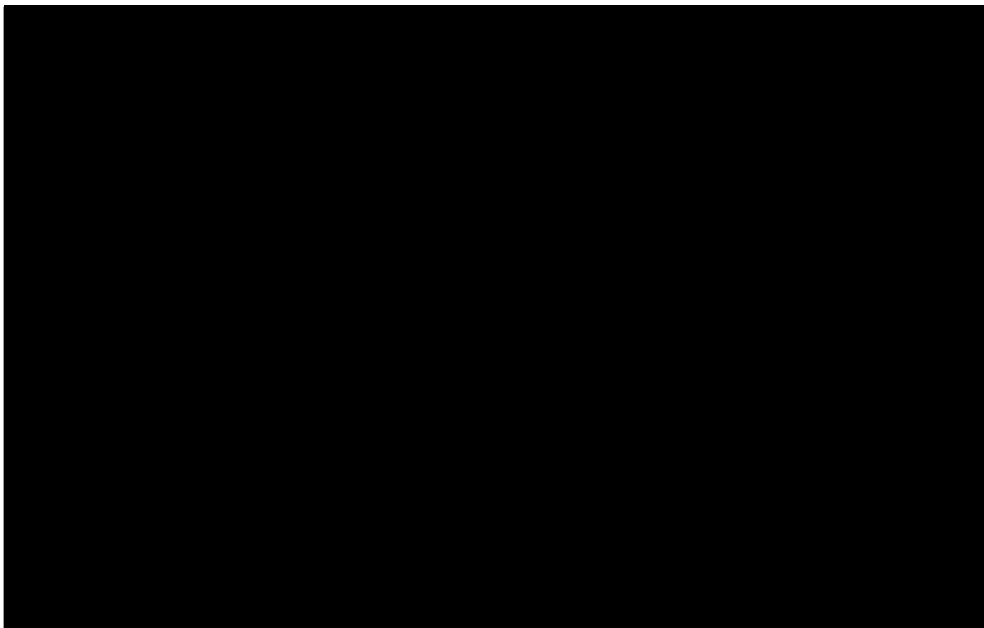
Expected change in device usage due to new iPad

Will use the device less than I do today



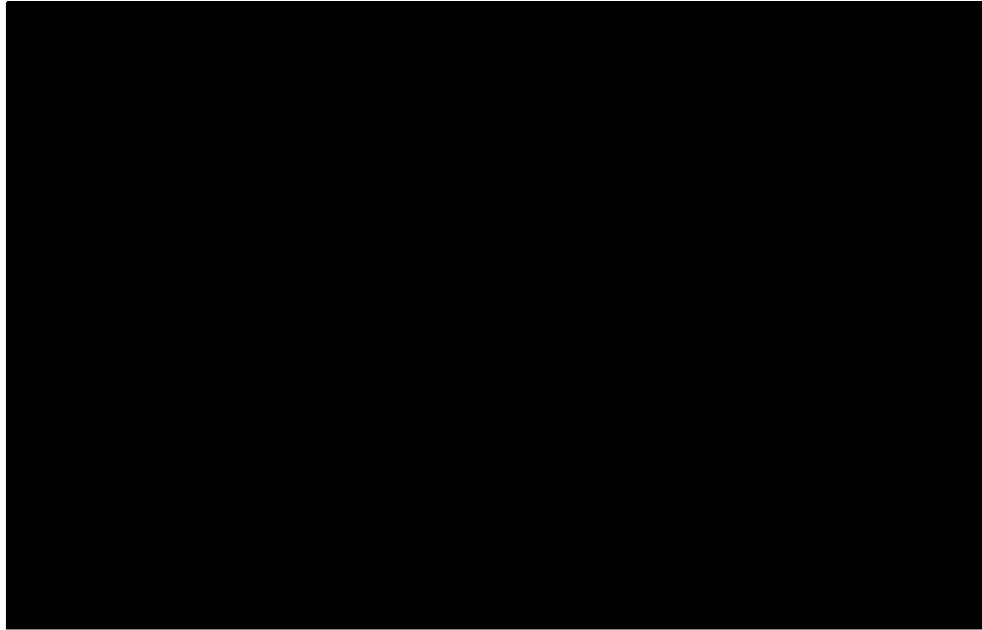
Expected change in device usage due to new iPad

Will use the device as much as I do today



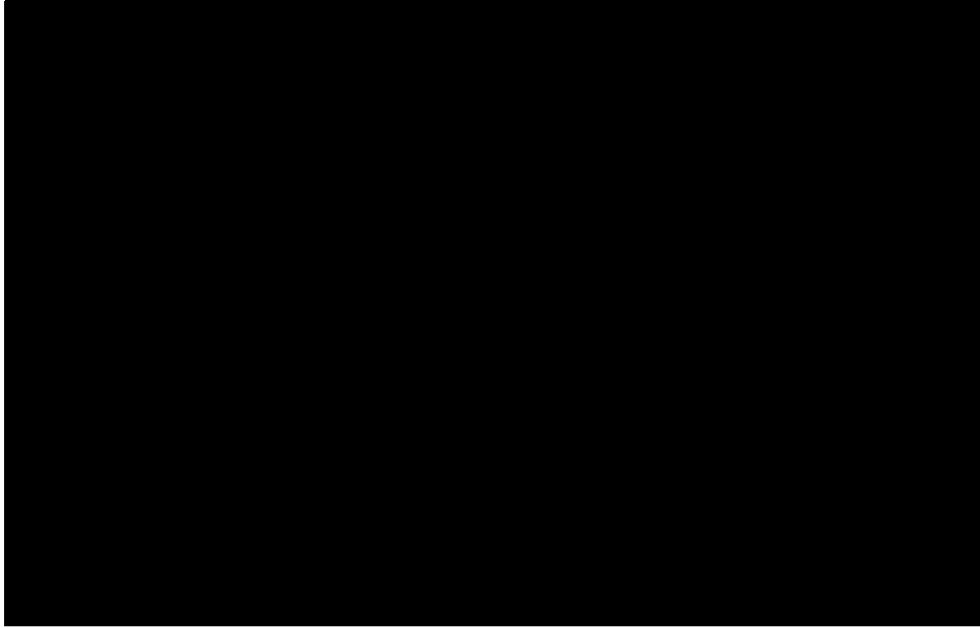
Expected change in device usage due to new iPad

Will use the device more than I do today



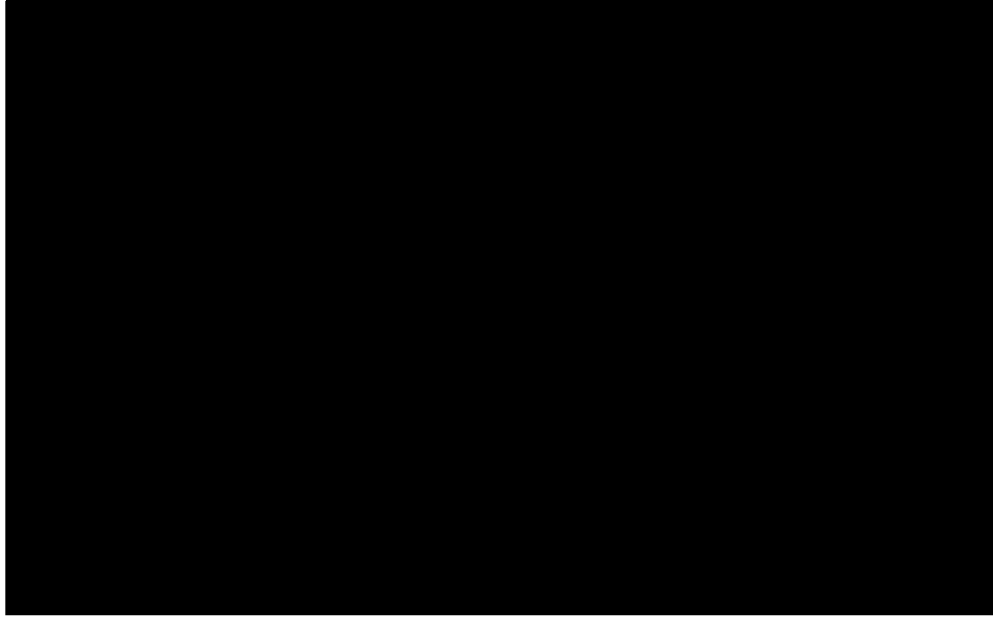
Expected change in device usage due to new iPad

Will use the device less than I do today

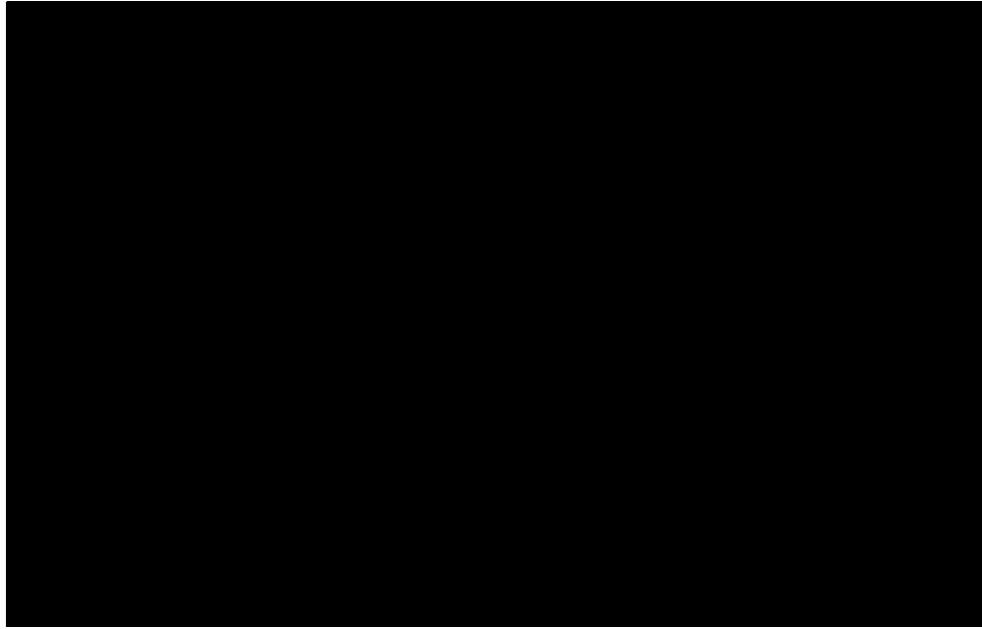


Accessories

Accessories using with iPad



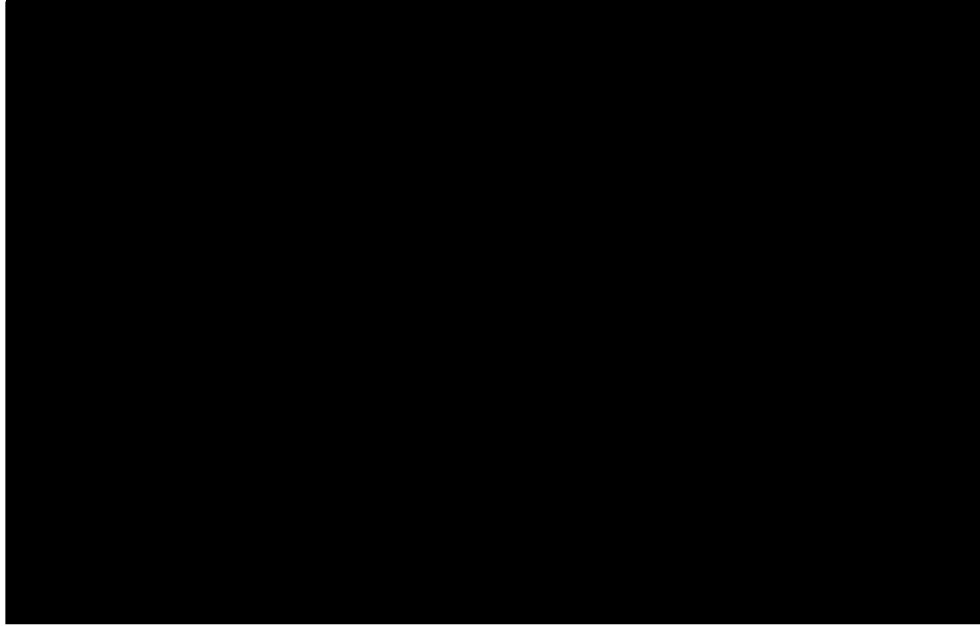
Accessories using with iPad



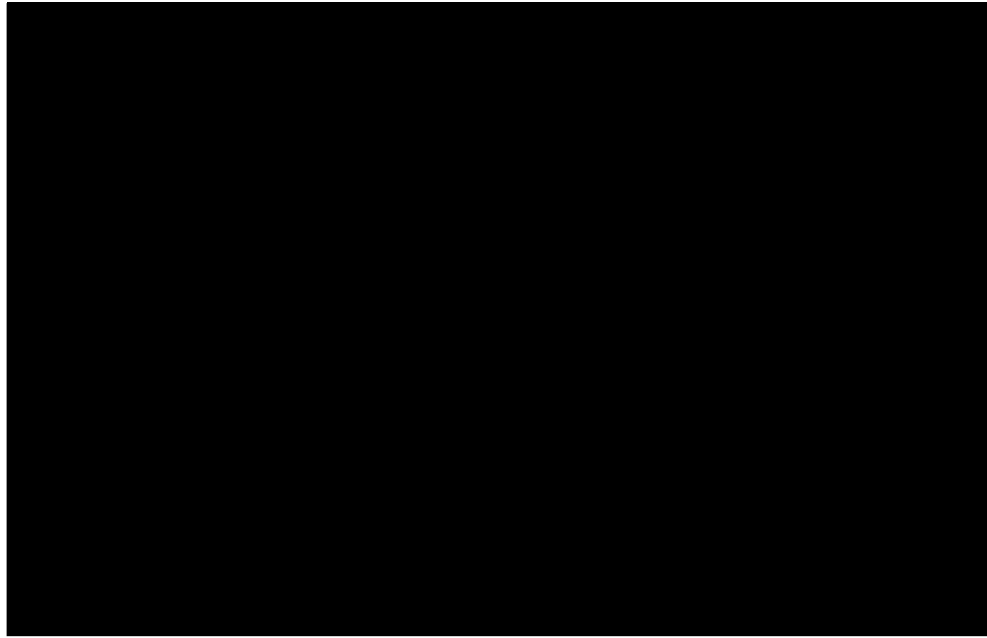
Accessories using with iPad



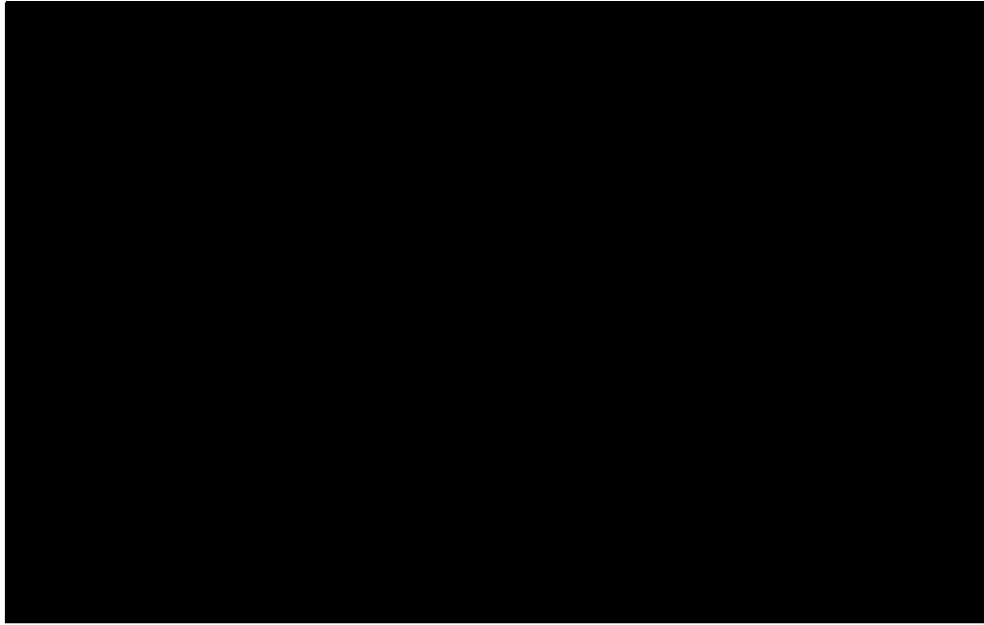
Accessories using with iPad



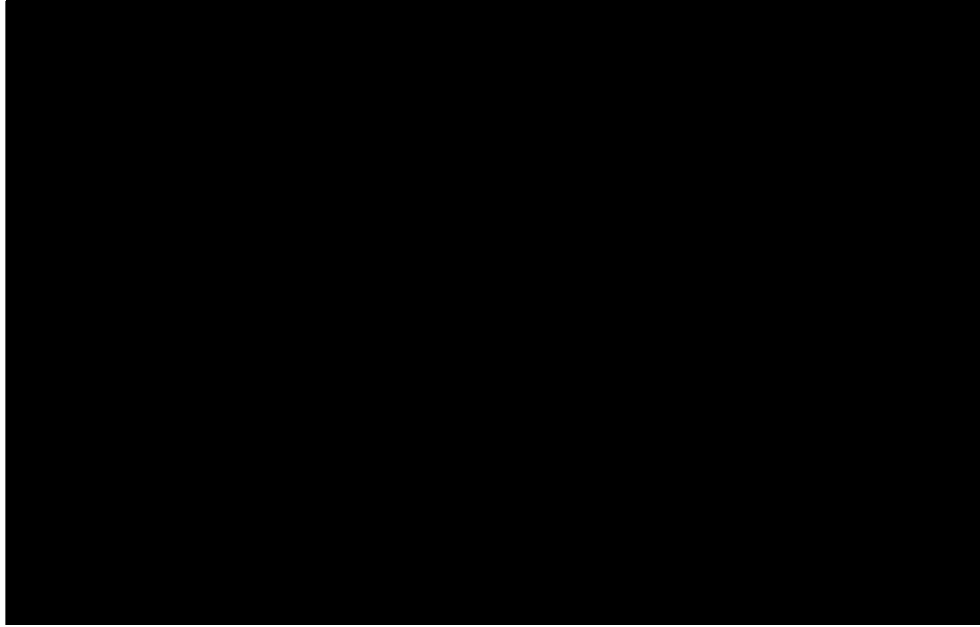
Accessories using with iPad



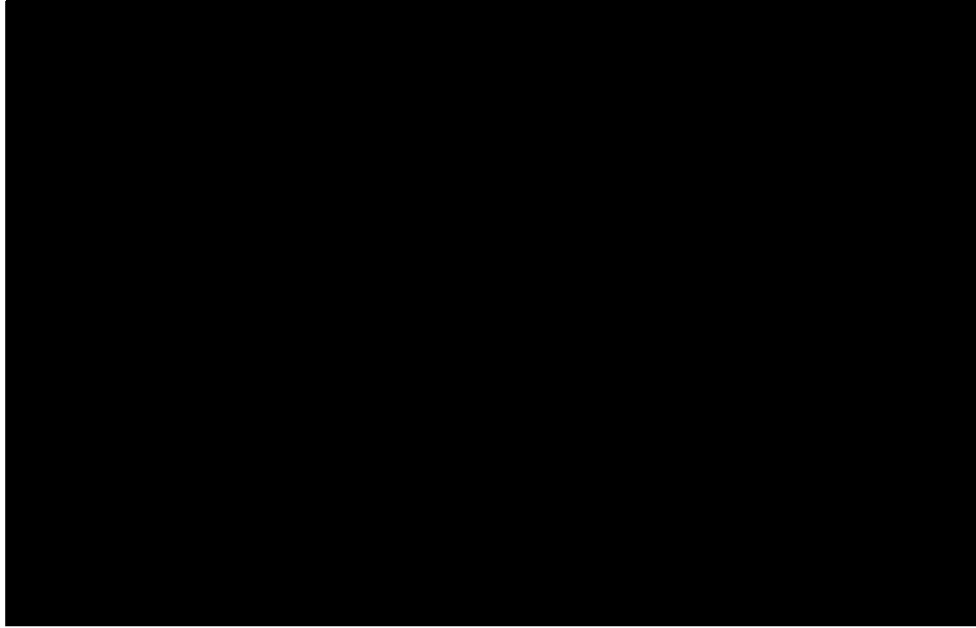
Types of headphones or earphones used (among those who use headphones or earphones)



Types of headphones or earphones used (among those who use headphones or earphones)



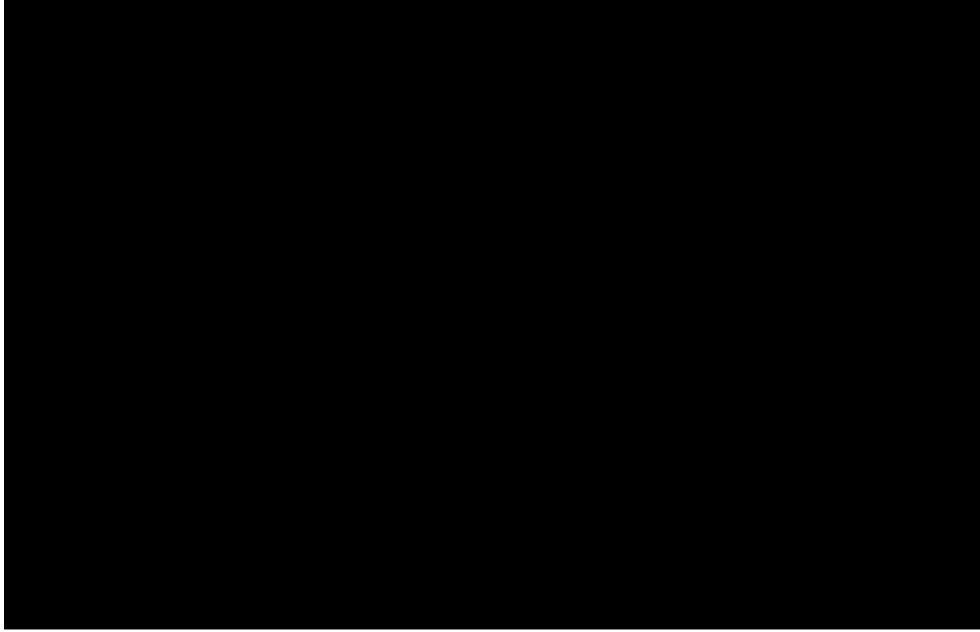
Types of headphones or earphones used (among those who use headphones or earphones)



Types of headphones or earphones used (among those who use headphones or earphones)

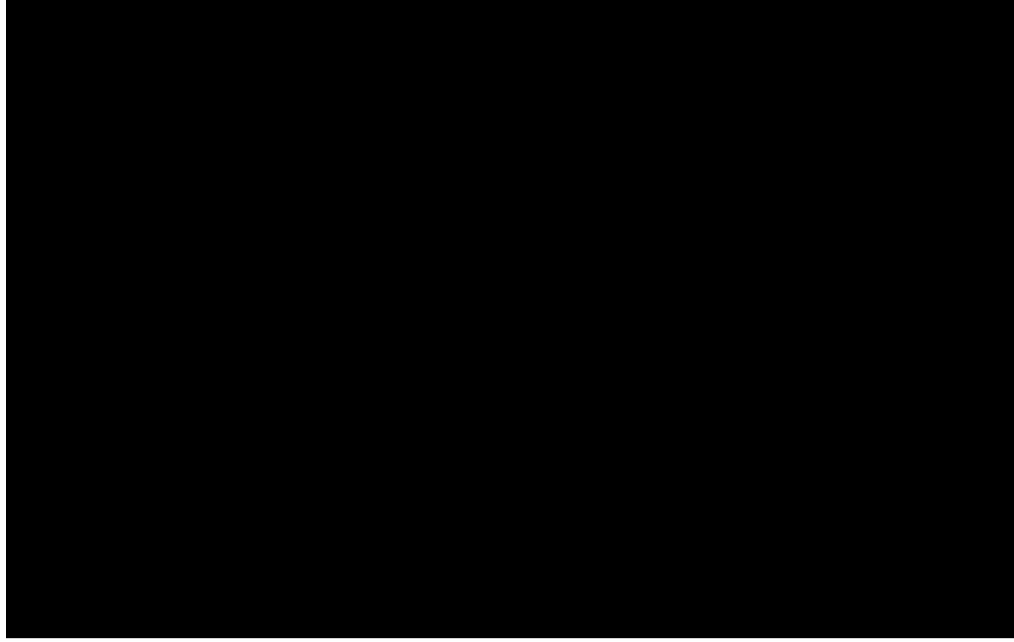


Types of cables and adapters used

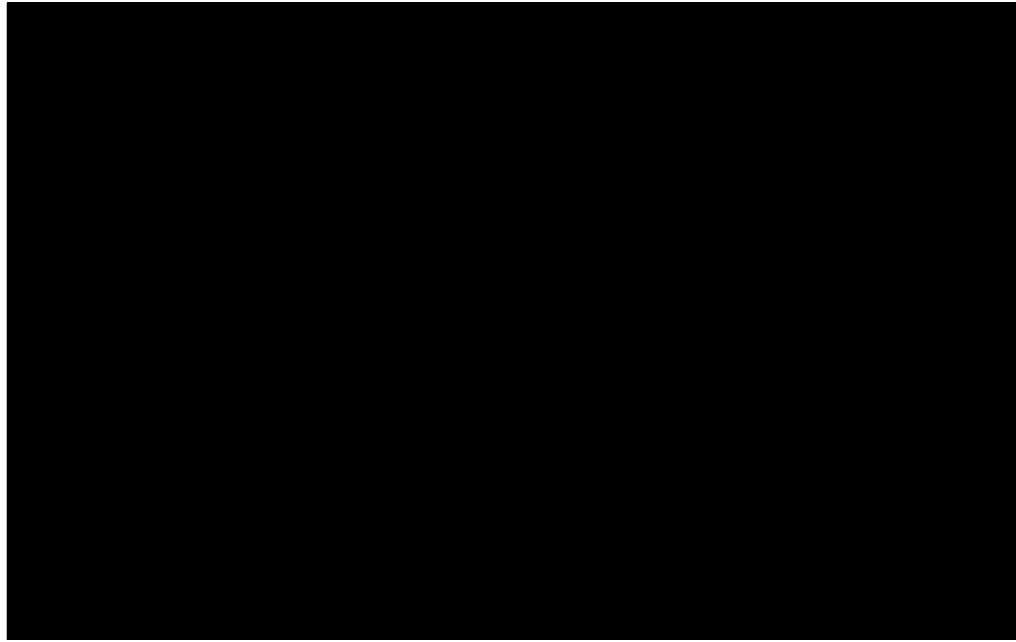


Apple Pencil

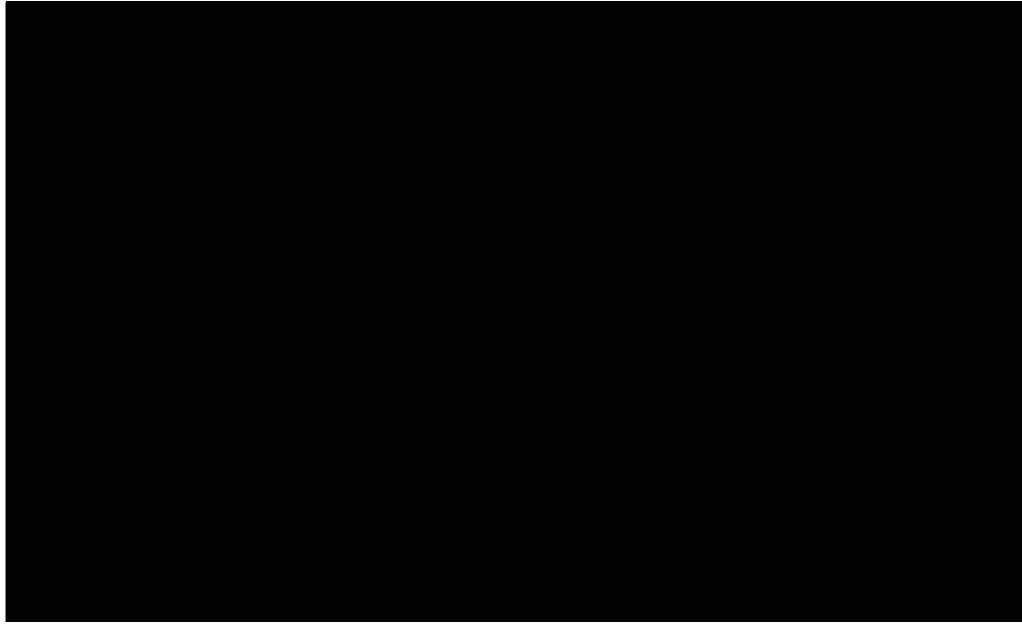
Apple Pencil purchase intent



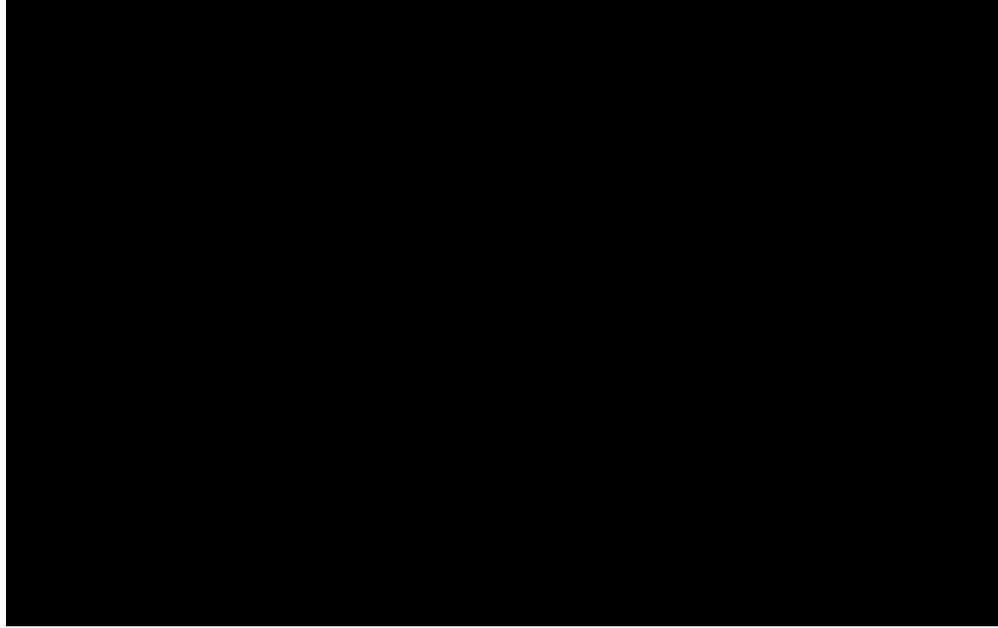
Apple Pencil purchase intent



Overall satisfaction with Apple Pencil



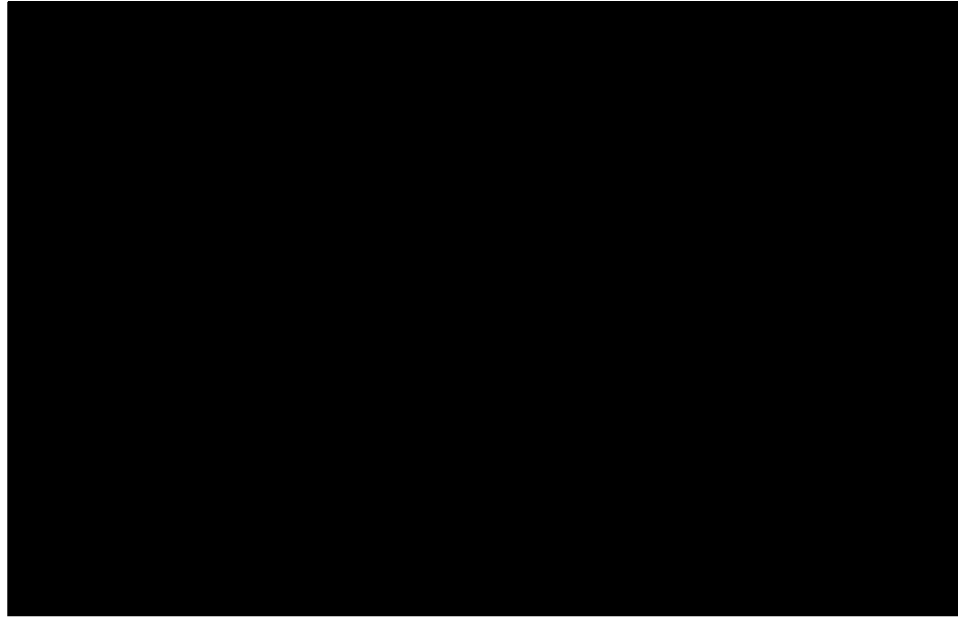
Overall satisfaction with Apple Pencil



Usage of Apple Pencil



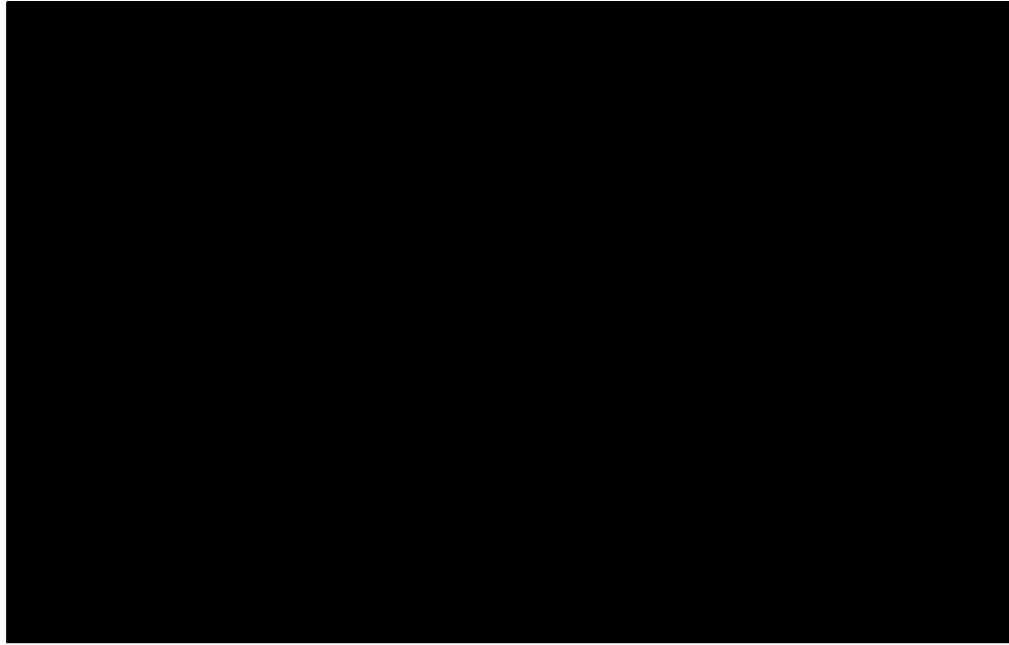
Usage of Apple Pencil



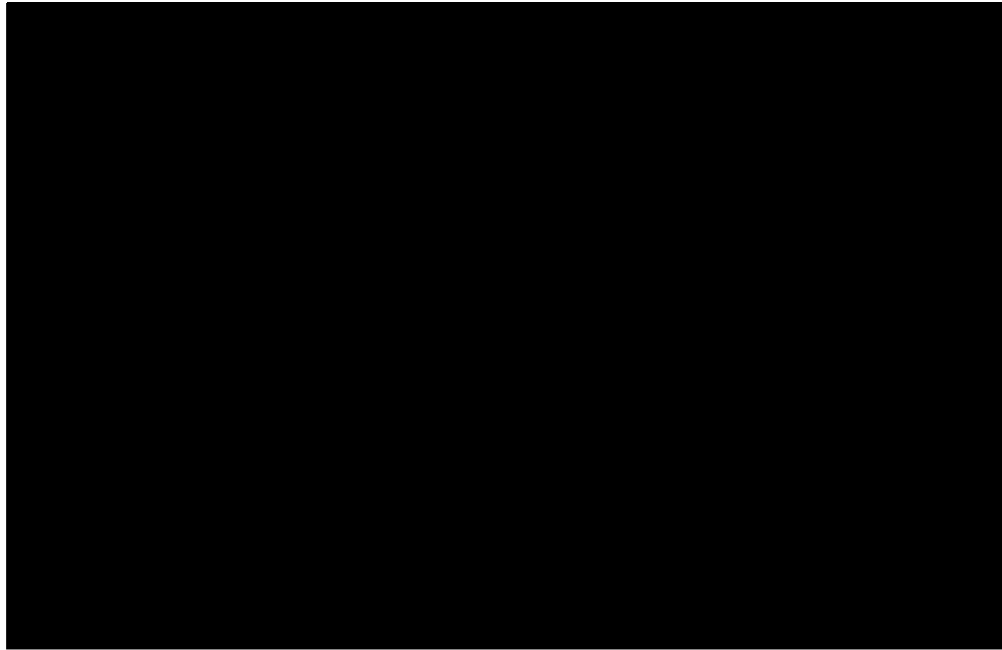
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Keyboard

Overall satisfaction with Smart Keyboard

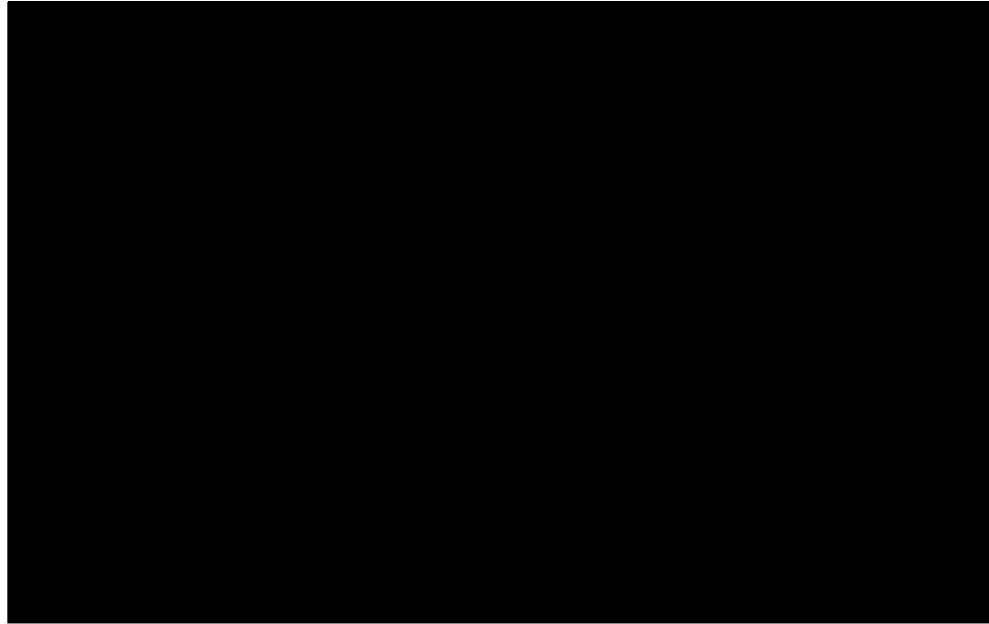


Overall satisfaction with Smart Keyboard Folio



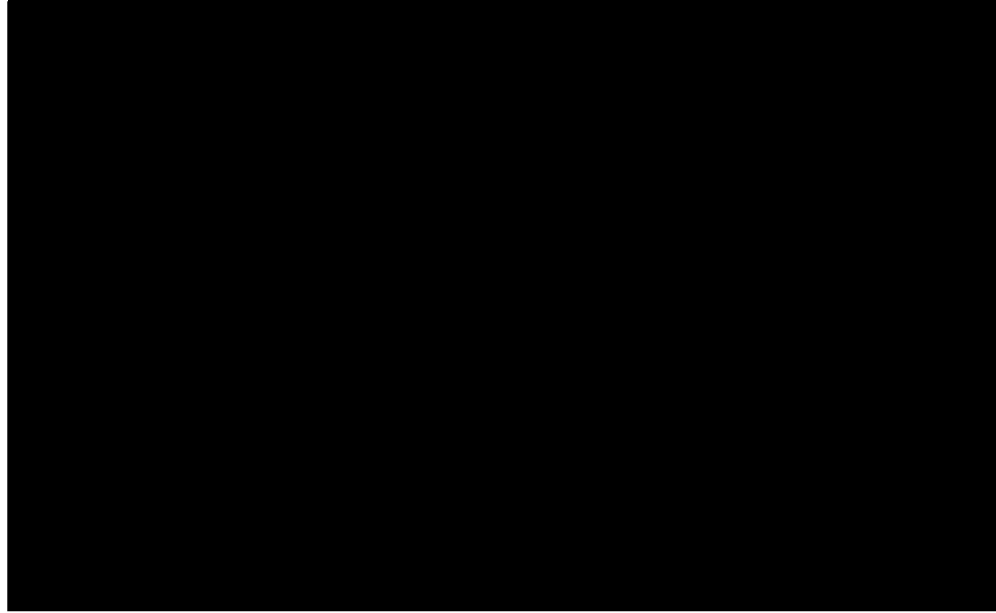
Demographics

Age



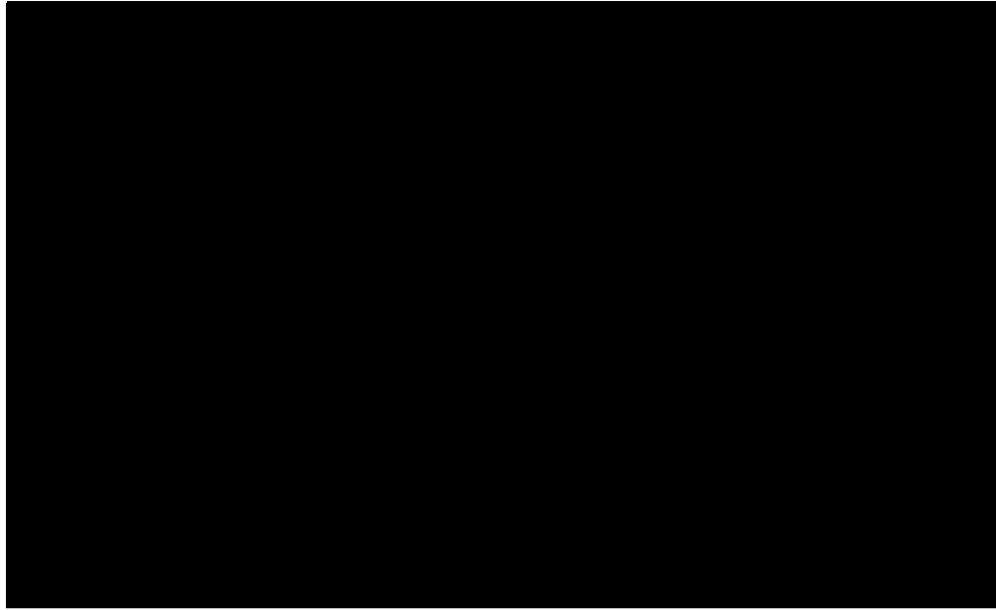
Age trend

Under 25



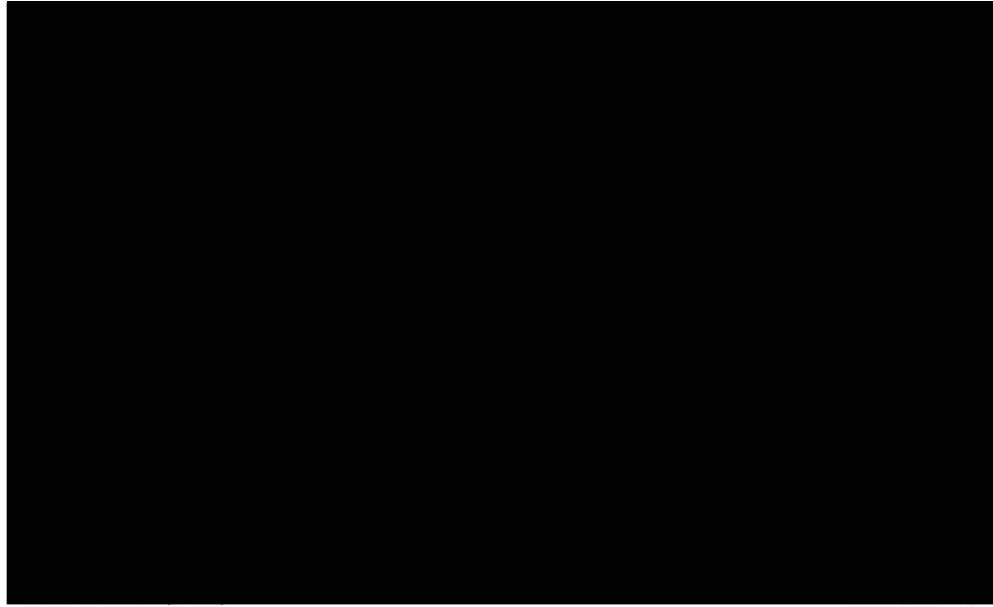
Age

Under 25

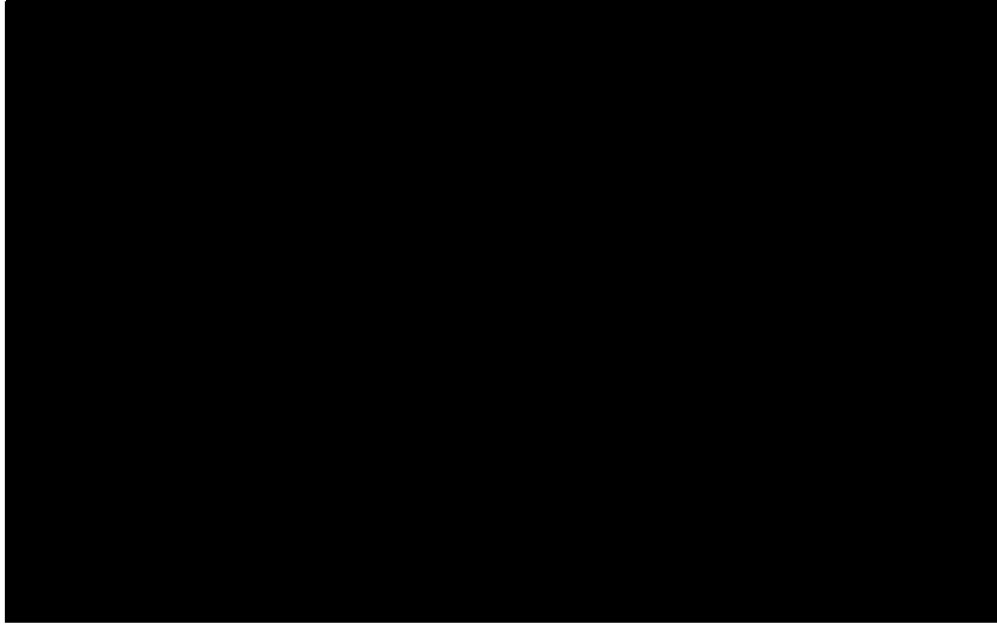


Age

45 +

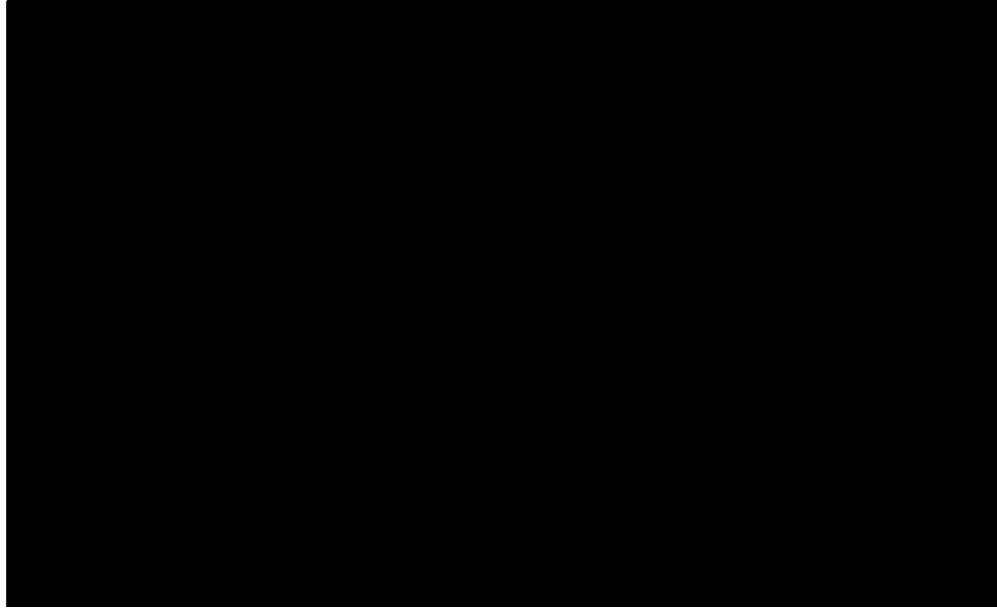


Gender

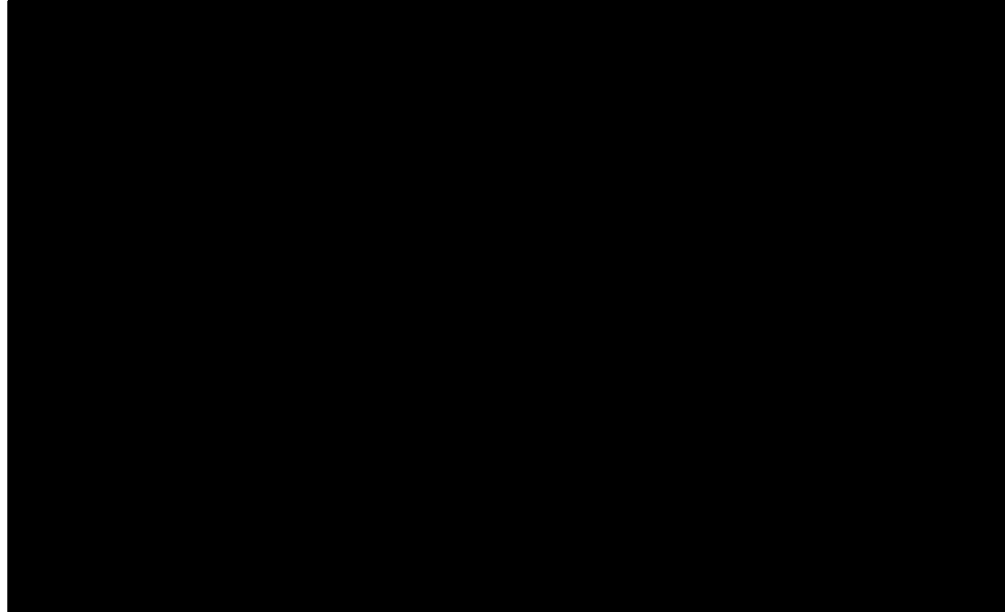


Gender

Male

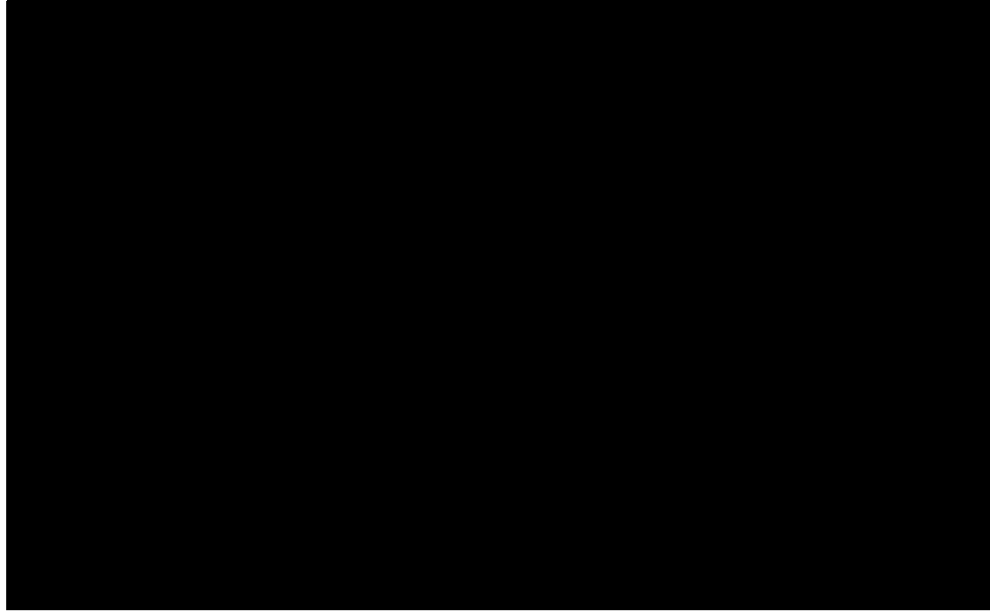


Student status



Student status

Student (net)



Appendix: Size perceptions

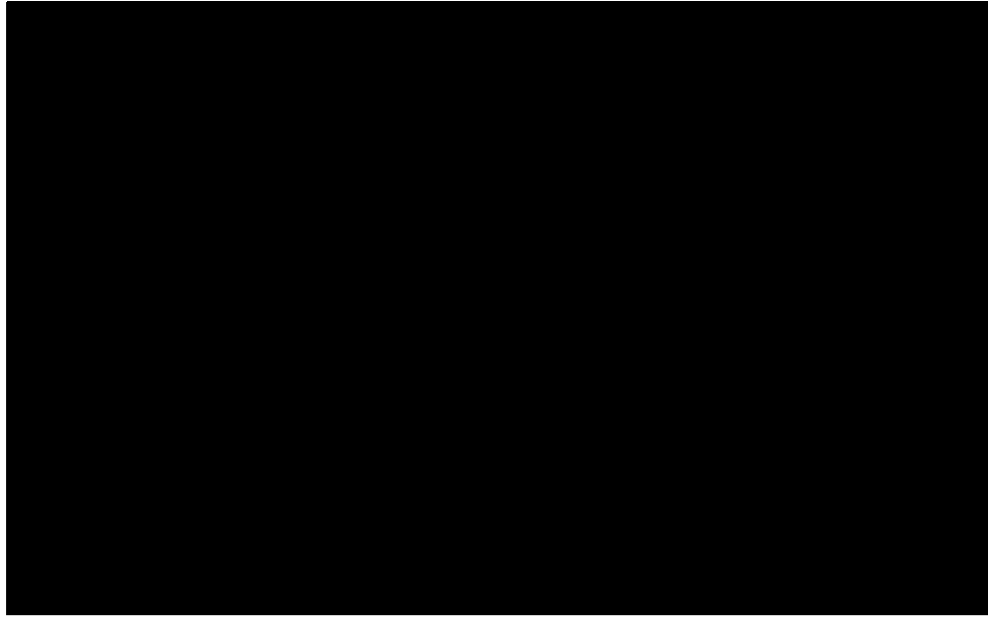
Size perceptions

Way too big/somewhat big



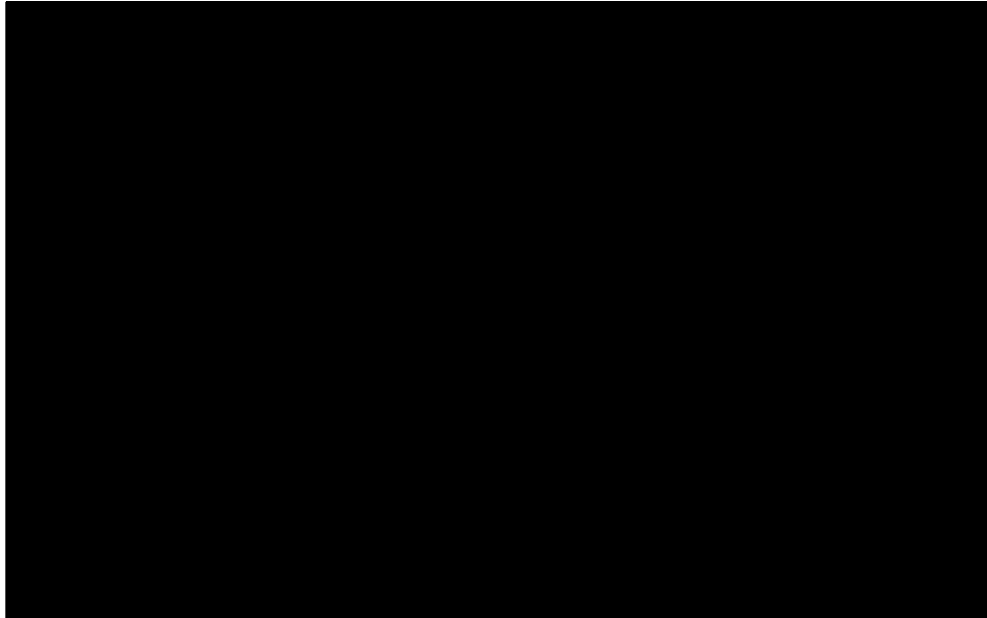
Size perceptions

Way too small/somewhat small



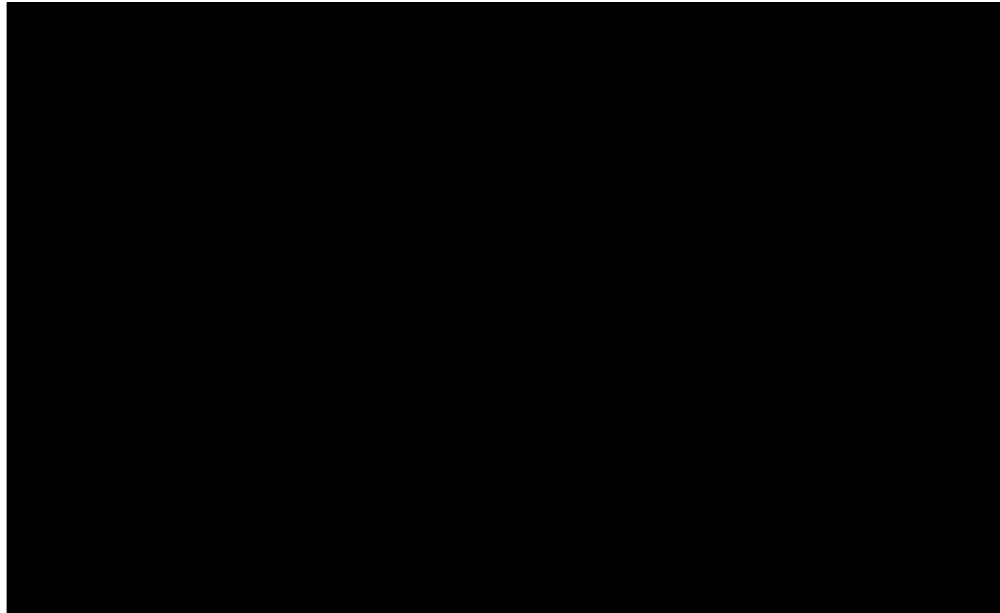
Appendix: Technology ecosystem

Apple products own and use



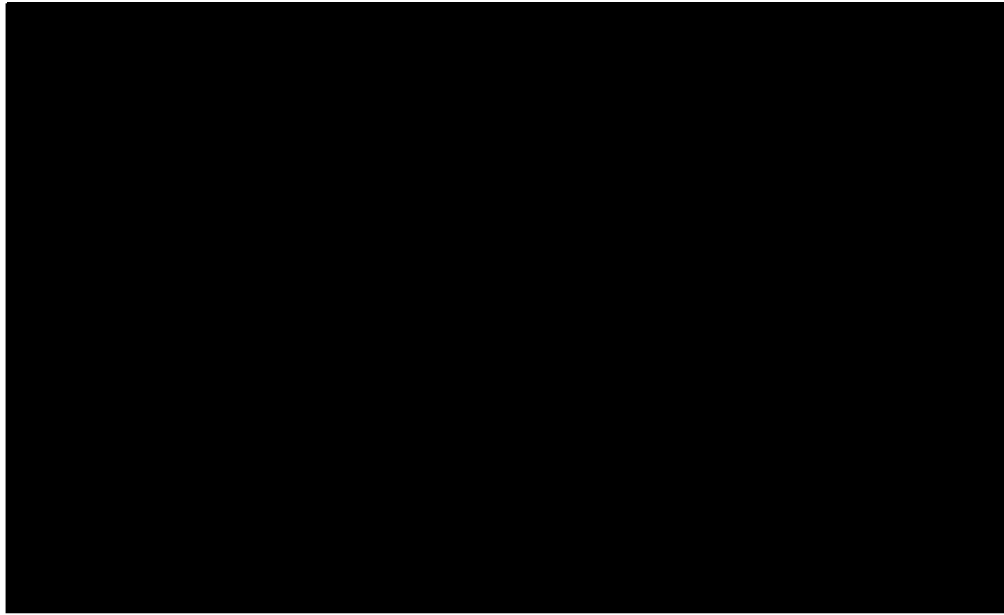
Apple products own and use

Mac (net)



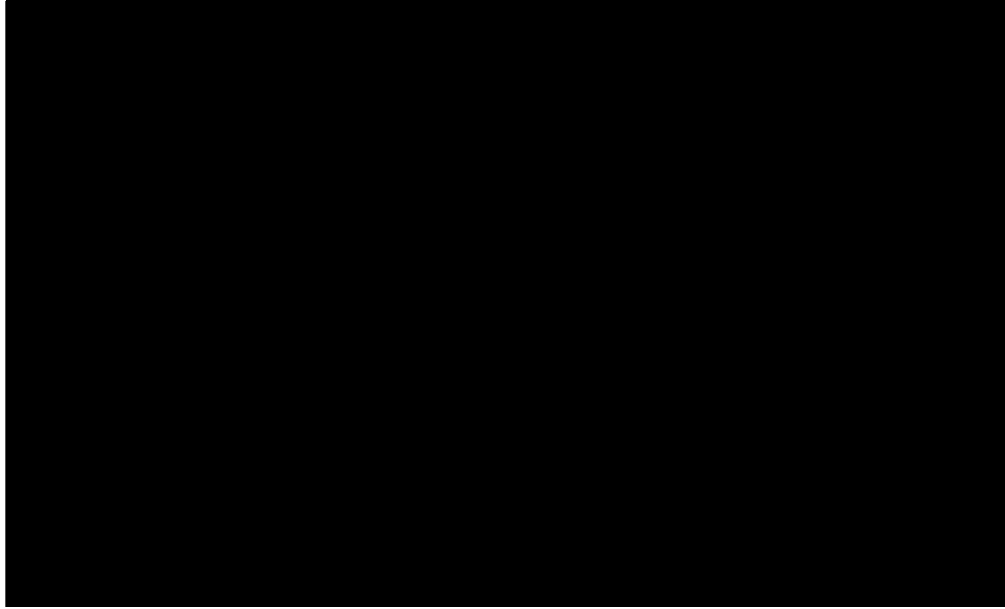
Apple products own and use

iPhone

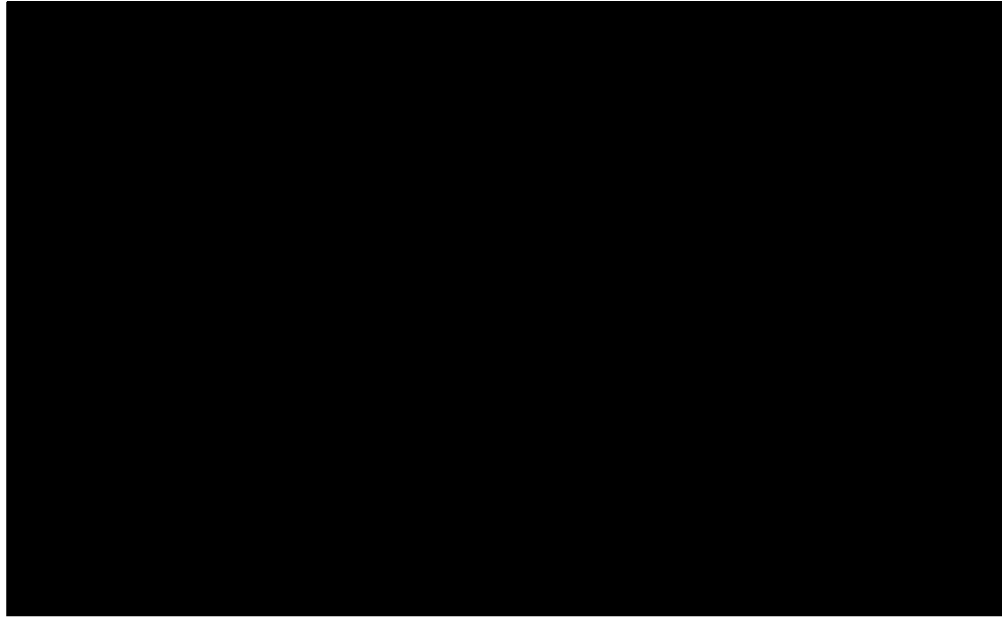


Apple products own and use

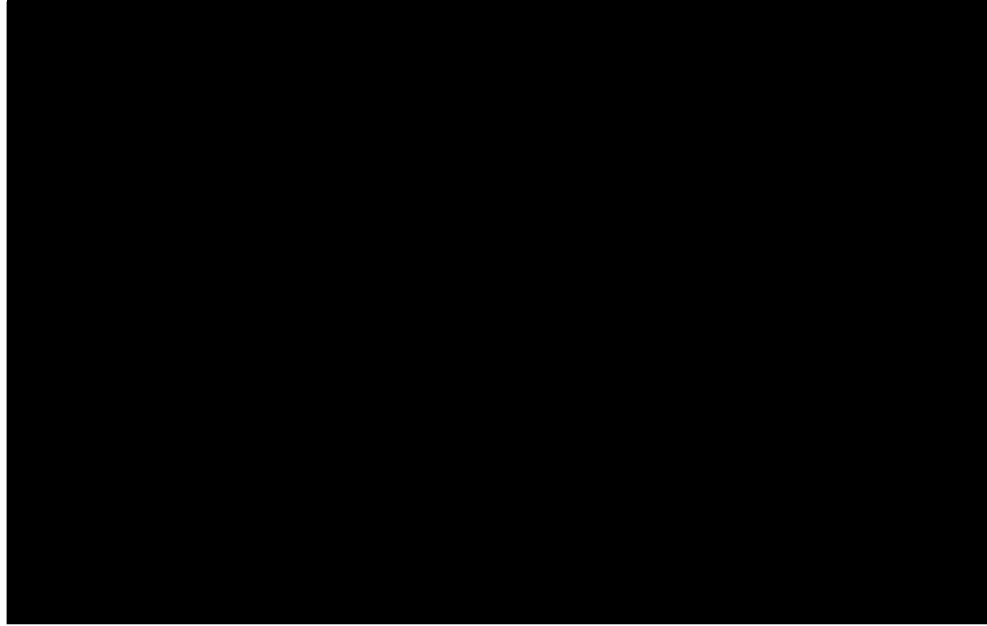
Apple TV



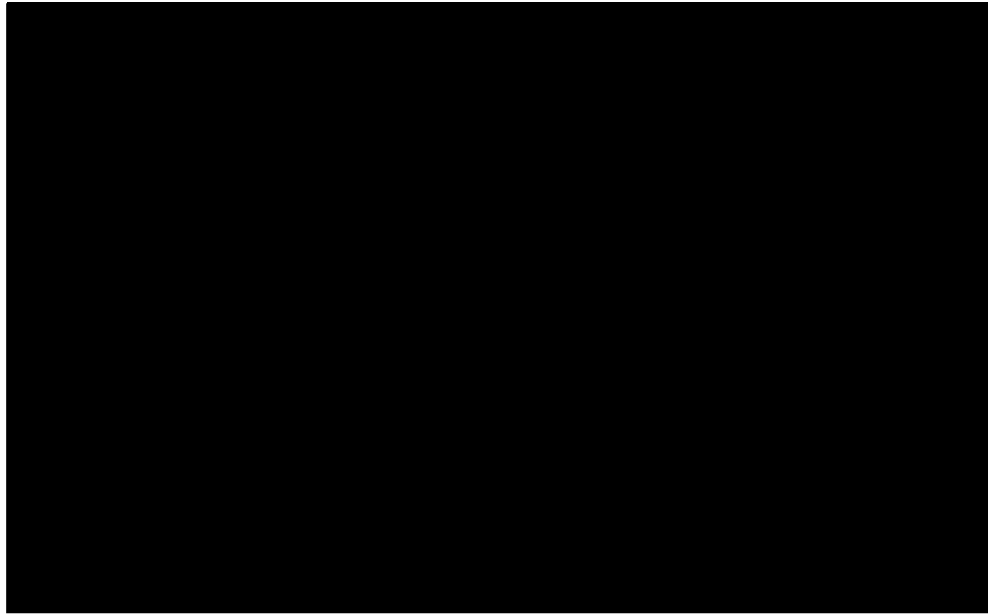
iPhone model own and use



iPhone model own and use

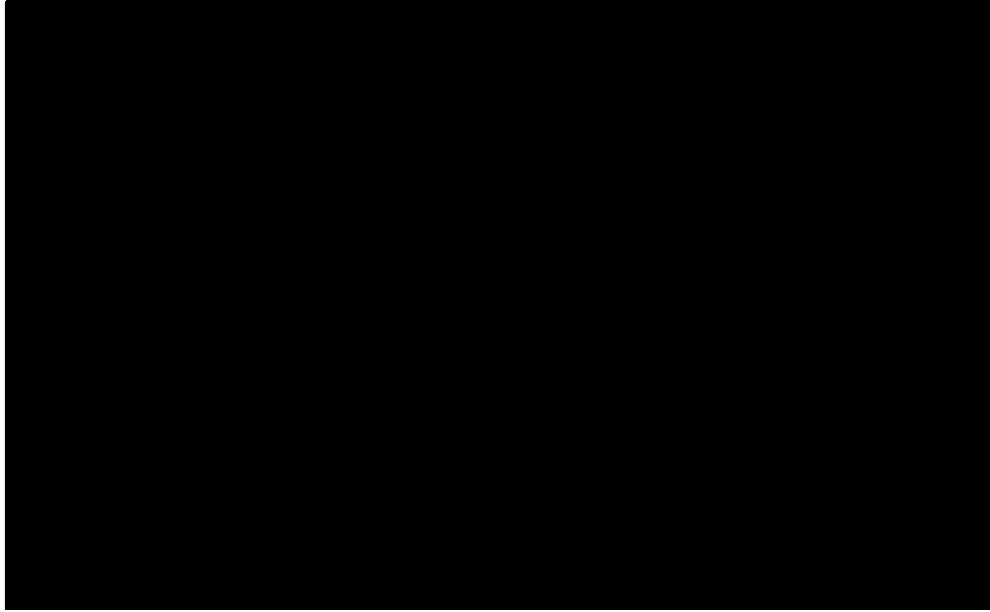


Total number of iPads in household (includes new iPad)

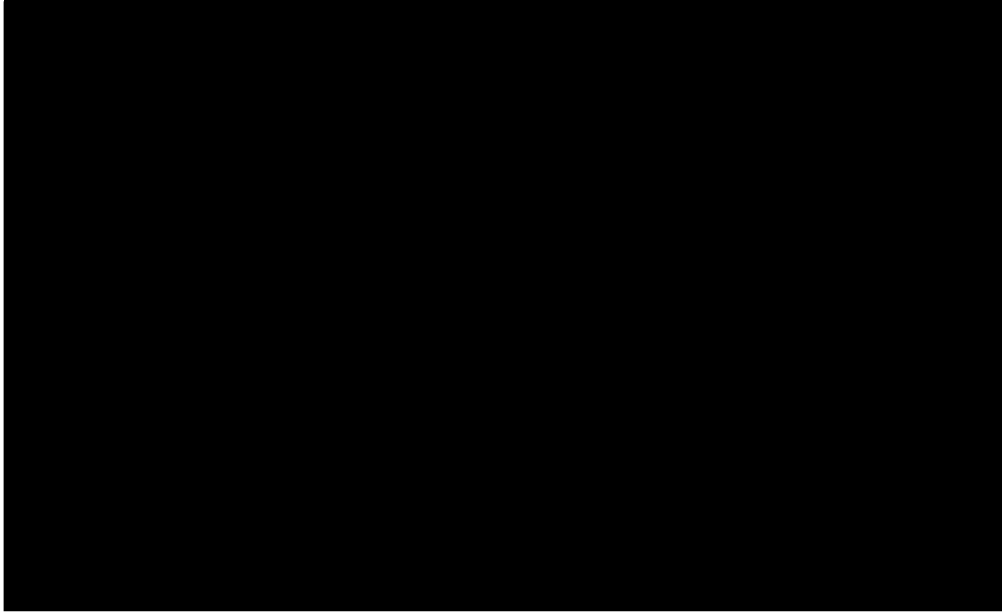


Total number of iPads in household (includes new iPad)

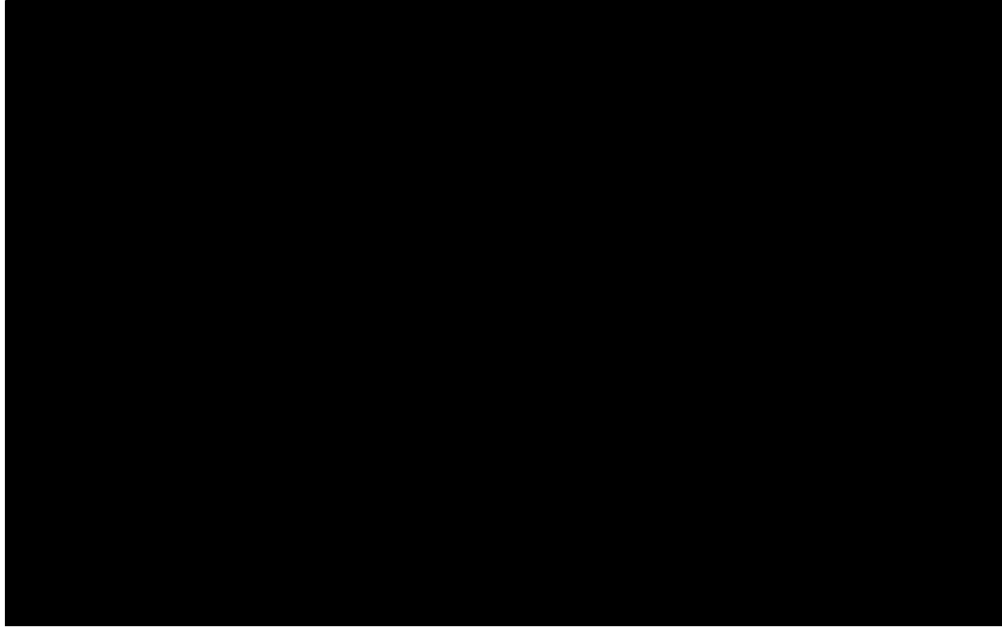
2 + (net)



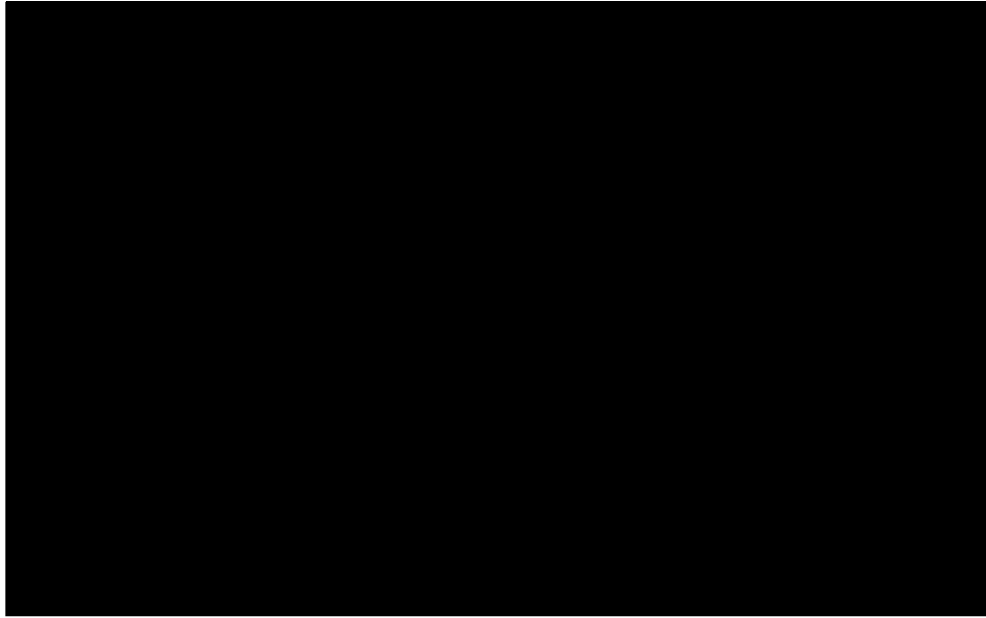
Non-Apple devices own and use



Non-Apple devices own and use

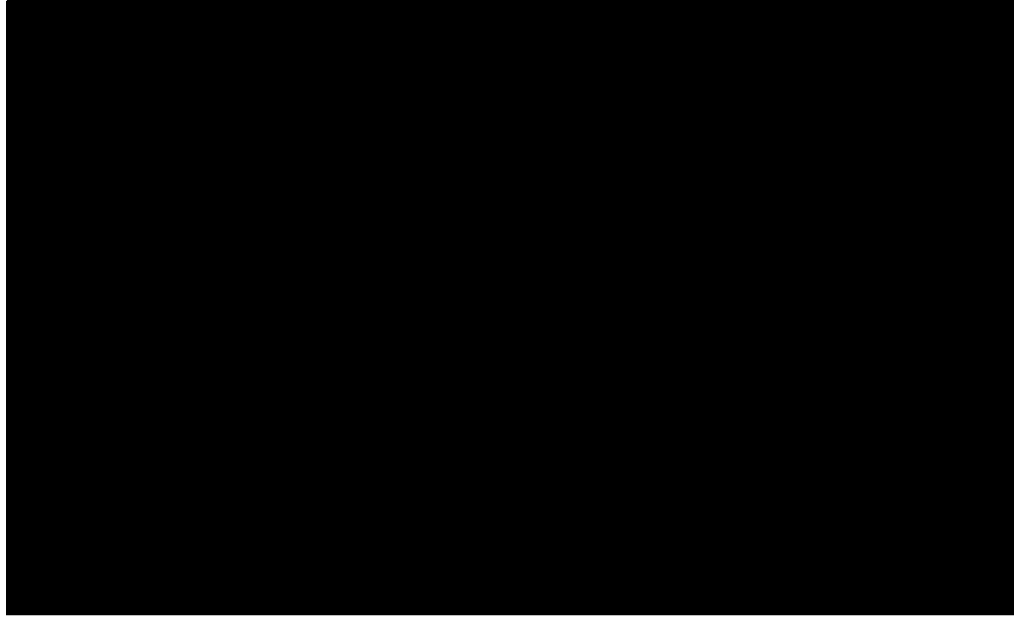


Non-Apple devices own and use

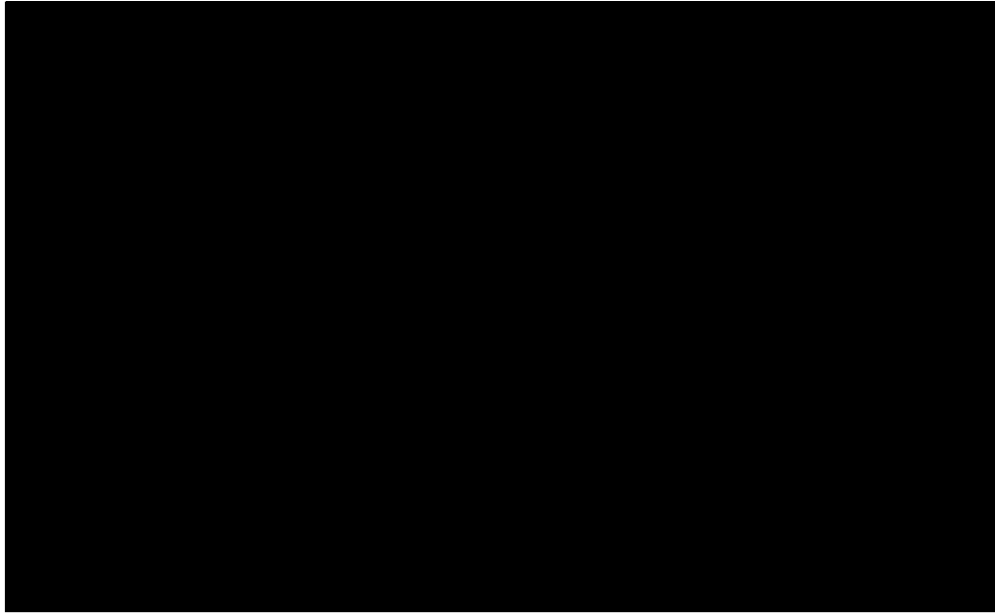


Appendix: iPad Model Mix

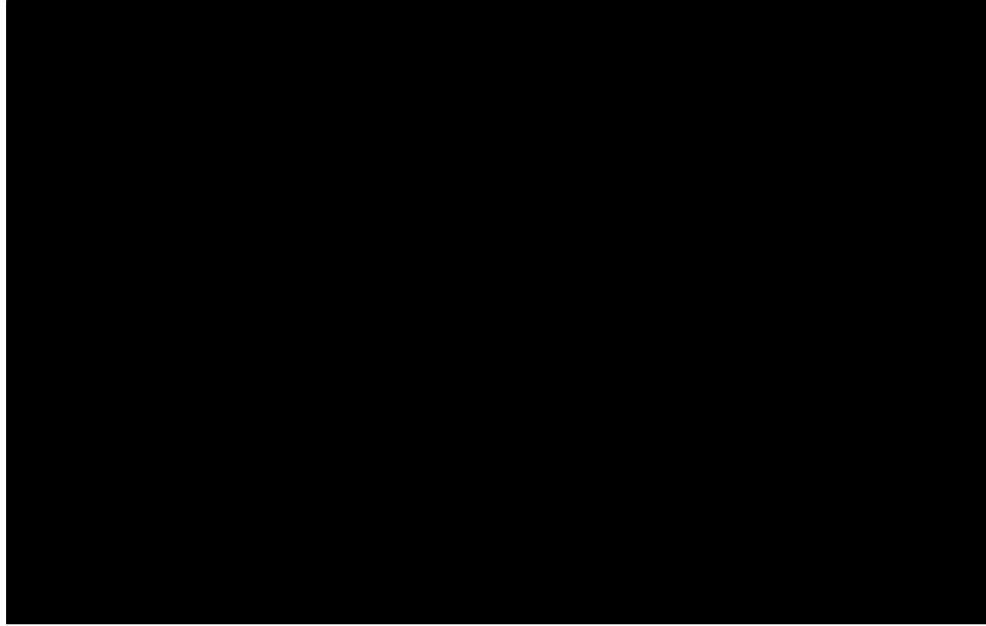
Model



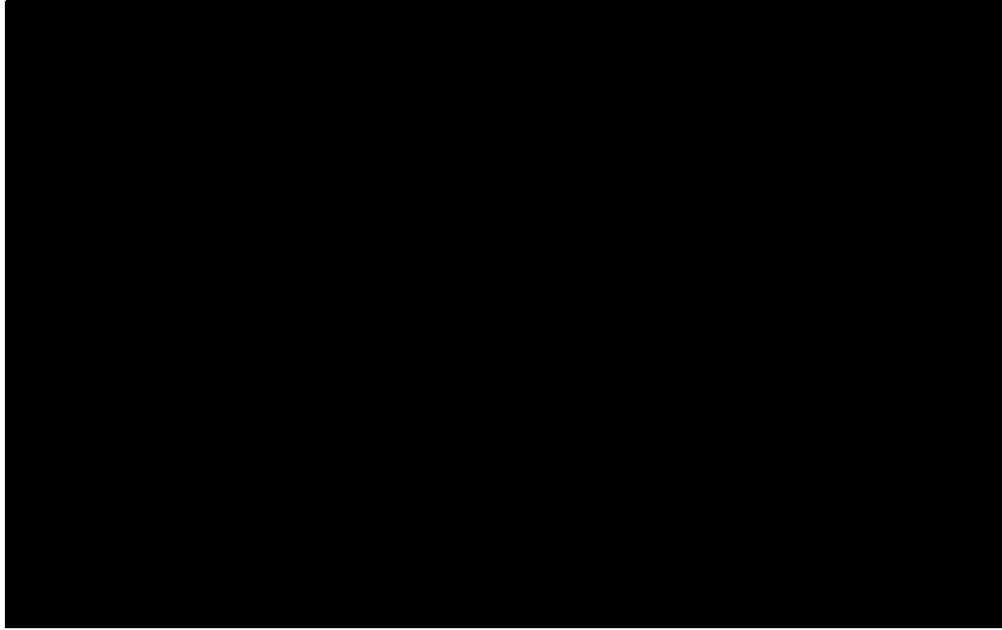
Connectivity



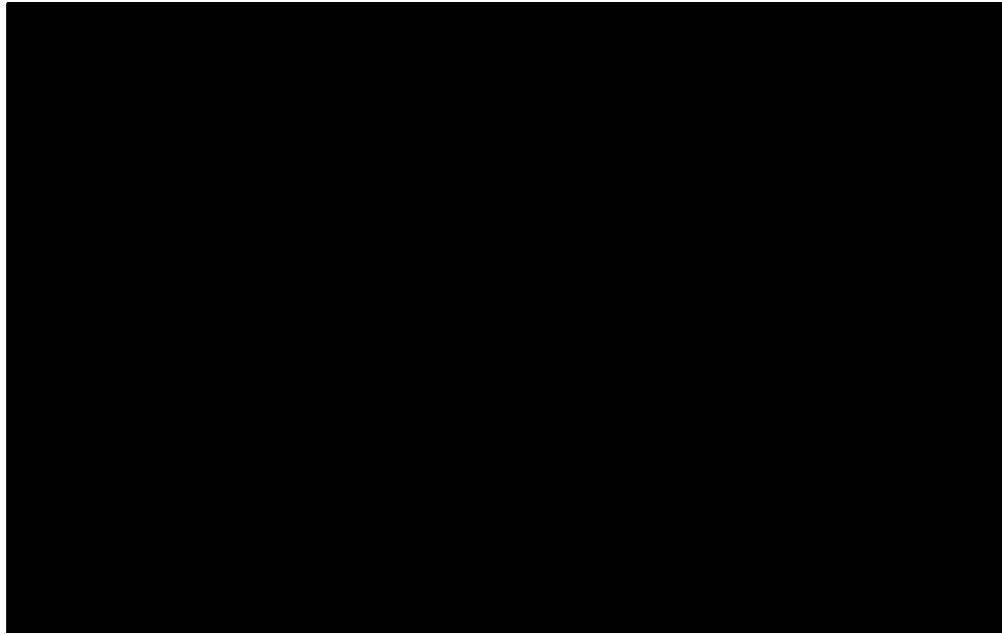
Connectivity



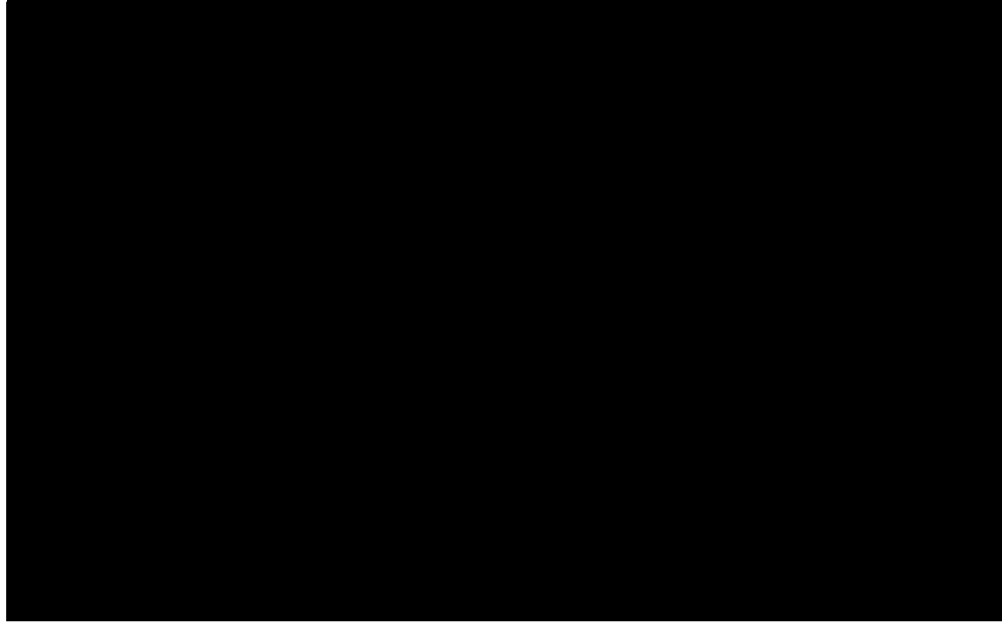
Connectivity



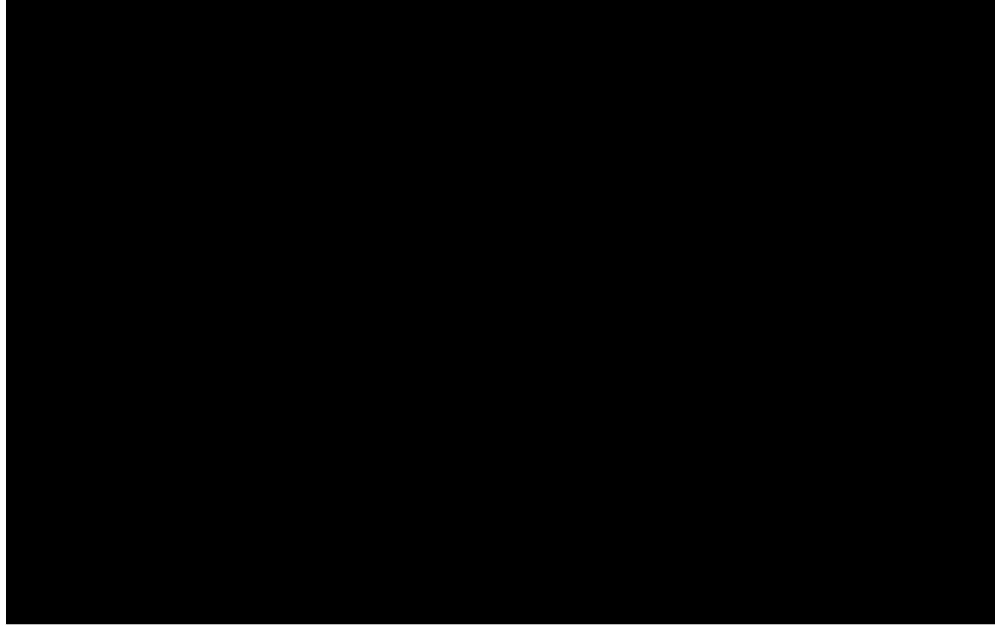
Connectivity



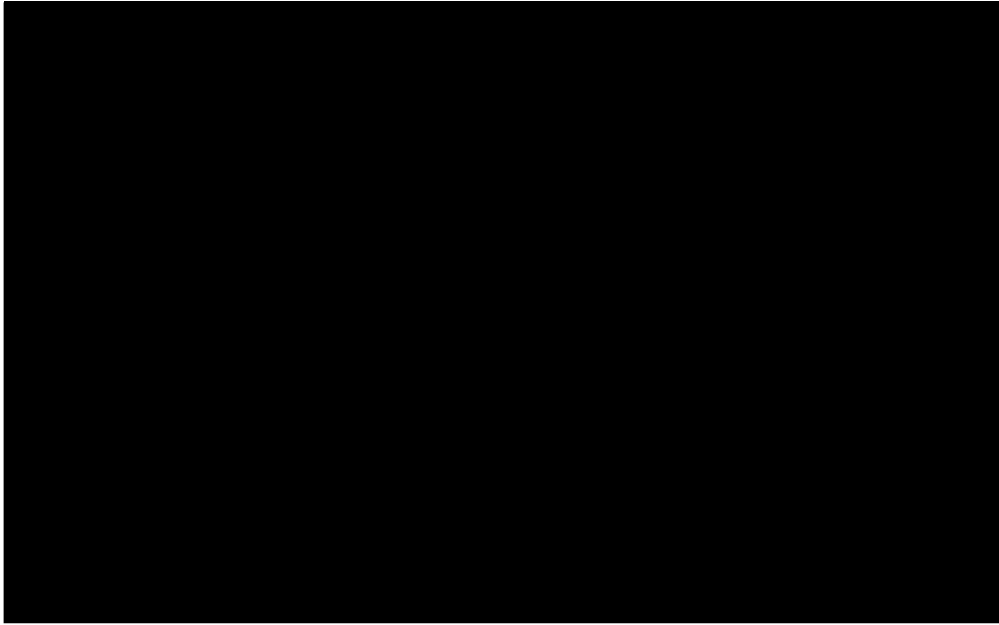
Capacity



Capacity



Capacity





iPad Buyer Survey

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